

LCFEF Endowment

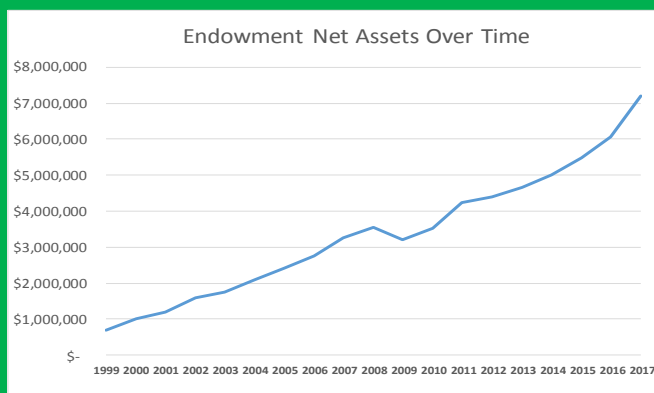
Ensuring Educational Excellence for Tomorrow

LCFEF Endowment Mission

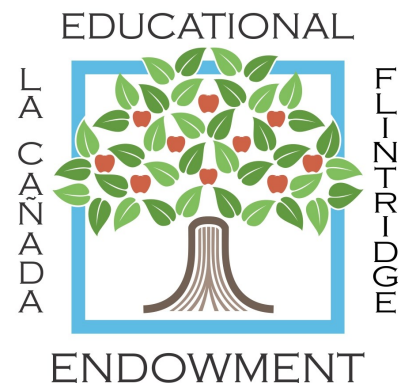
The Endowment Fund of the La Cañada Flintridge Educational Foundation is committed to enhancing the educational standards and reputation of the La Cañada Unified School District, one of the country's most highly regarded public school systems. Annual gifts to LCUSD provide the means to achieve this. The Endowment Fund's mission is, in perpetuity, to increase and stabilize the long-term growth of gifts to LCUSD.

The Foundation's Endowment Fund is a cornerstone of the Foundation's funding strategy. Over time, the Endowment will grow to a very substantial size and provide larger contributions to the Foundation's annual campaign. Subject to certain restrictions, the Endowment can contribute up to 5% of the 16-quarter rolling average of its assets to the Annual Campaign each year. As the Endowment grows, larger contributions can be made each year to the Annual Campaign.

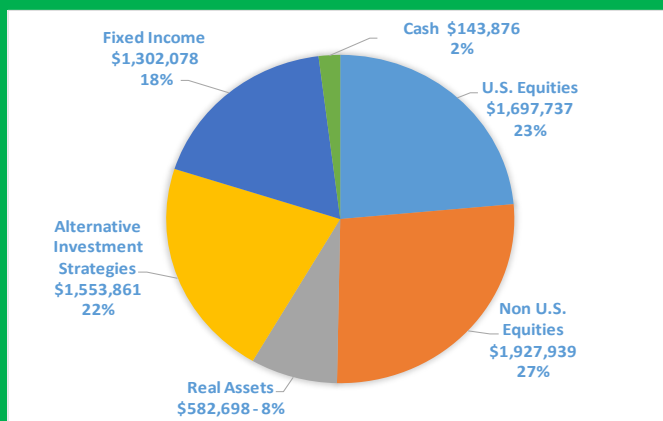
Endowment Net Assets Over Time



Total Assets as of September 30, 2017 \$7,193,802



CCF Endowment Pool Asset



Portfolio Management

While the LCFEF Endowment Fund is managed by an experienced third party - the California Community Foundation - a group of independent Trustees are ultimately responsible for overseeing the Endowment. Each of the Trustees serves a term of five years, and new Trustees are selected as required. The Endowment by-laws call for at least two Trustees to have legal, investment management or financial advisory experience. LCFEF Endowment Funds are currently invested in the California Community Foundation's *Endowment Pool*, with the objective of preserving the real (i.e. inflation-adjusted) purchasing power of the investment pool net of annual distributions for grants and expenses. An additional objective is to provide a relatively predictable, stable stream of distributions for grants and expenses that keep pace with inflation over time.

Growing the Endowment – the story of our donors

“A society grows when its people plant trees in whose shade they know they will never sit.” (Greek proverb)

Making a gift to the Endowment Fund often appeals to individuals who understand the power of investing for the future. Since its inception in 1992, hundreds* of forward-thinking individuals have contributed to this vision.

This is an on-going campaign, seeking like-minded investors in our community’s future.

LCFEF Endowment Fund Donors*

\$250,000 +

Gordon and Dona Crawford

\$100,000 +

The Hotchkin Family
Rose Harrington
The Shupper Family Foundation
Fairmount Enterprises, LP
Gene and Mindy Stein
Joel and Wendy Bennett
Peter Palermo and Jeanne Maus
Casey and Elizabeth Fitzpatrick
The Phyllis and Angelo Mozilo Family Foundation
Michael and Jodi Powers
Scott and Mary Tracy
Matthew and Justine Plocher

\$50,000+

Elizabeth Andresen
Gertrude Josephine Bennett Family Foundation
Greg Boreham and Nancy Fairchild
Stephen and Elysa DelGuercio
Kenneth and Lori Gorvetzian
Brad and Vicki Schwartz
Chris and Kelly Davis
Paul and Heather Haaga
Chad and Alison Heath
Andrew and Nicole Johnsen
Kevin and Carrie Martin
Craig and Melissa Mazin
Chris and Michelle Morgan
John and Gina Ricci
Harpal and Gita Singh
Gene and Mindy Stein
Scott and Mary Tracy
Kevin and Sandy Tsujihara
Paul and Betty Woolls
John and Georgina Ricci

\$25,000+

Ron and Fabiana Badie
David and Julie Battaglia
Malcolm Boyd and Renee LaBran
Andrew and Joyce Chang
Doris Young Coates
Sandy Gauntlett
Mike and Jane Goldberg
Leonard and Mary Kenney
James and Melanie Liu
Paul and Crista Murray
Joel and Darleen Peterson
John and Robin Renfro
Diana Schulz
Don and Cayce Sheppard
Mark and Jan Tinoco
Jon and Ginny Tolkin
Brad and Clarissa Weirick
John and Karen Clark
Chris and Alexandra deFaria
Doug and Ann Drummond
Kevin and Heather Ehrhart
Timothy and Shannon Griffin
Eric and Shelby Grey
Kevin and Leslie Kevorkian
Danielle McPherson
Peter and Kelly McWilliams
Jeremy and Julie Milbrodt
John & Shannon Petersen
Michael and Tammi Wright
Julia and Bob Cooper
Chris and Christi Matarese
Jason and Billie Melillo
Jeff and Karmen Parks
Barry and Lisa Reed
Brent and Deborah Weirick
Brett and Tara Woodford

\$10,000+

Elizabeth Argue
Denny and Brynn Barge
Jack and Patricia Beauchamp
Dhiya and Mindy El-Saden
Dana and Rose Fox

\$10,000+ (Continued)

Chris and Sonja Bradley
Jeanne Broberg
Kirk and Constance Campbell
William and Raissa Choi
Sue and Tom Fuelling
Andy and Debbie Gilmour
Lee and Hilary Gregg
Charles and Kathryn Hofgaarden
Hugh and Diane Jones
Craig and Theresa King
Campbell Family Foundation
Peter and Teri Lauenstein
Lou Jones & Associates
Vito and Rebecca Mairone
Mike and Ingrid McConnell
David and Elizabeth McFadzean
Irene Mendon
Raffi and Myrna Mesrobian
Al and Vaida Mikuckis
Craig Miller and Lisa Arnett
Jeffrey Miller and Paula Miller
Scott and Lindsay Monroe
Robert and Shelley Packer
Jeffrey and Karmen Parks
Glendon and Kelley Rusch
Mark and Nancy Samuels
Kathleen Smith
E. Lawrence and Mary Spencer-Smith
Tracy and Suzanne Stewart
Alex and Vickie Taylor
Donald and Lynn Voss
Shaw Wagener and Deborah Heitz
Charles and Martha Wolf
Charles and Tammie Woodhouse
Philip and Wendy Wyatt
Joshua and Paris Cohen
James and Joon Ford
Craig and Michelle Gropper
Artyom and Maria Linnik
Greg and Heather Lhotka
Rob and Paige Olson
Zachary and Tiffany Petroc
Chris and Melody Petrossian
Joseph and Tina Radabaugh

*Due to space constraints, the hundreds of individuals who have contributed over the years to the Endowment Fund through previous campaigns and appeals cannot be listed here. Please see a complete listing at <http://lcfef.org/endowment-fund-donors/>

Leaving Your Legacy - Planned Giving and the LCFEF Endowment

“What you leave behind is not what is engraved in stone monuments but what is woven into the lives of others.” -Pericles

Simple ways to make a planned gift to the Endowment Fund include gifts of cash, appreciated assets and life insurance.

Charitable lead trusts and charitable remainder trusts are other ways you can contribute to the LCFEF Endowment while concurrently improving your own and/or your family’s financial situation.

Endowment Leadership

Trustees:

Valerie Aenlle-Rocha
Bob Cooper
Chris Davis
Chad Heath
Craig Mazin
John Petersen
Stephanie Fossan

Committee Chair:

Matt Weber
Joe Radabaugh