



**LEGACY
ENDOWMENT**
Your pathway to community giving

STEWARDSHIP REPORT 2021

Connecting People With Causes That Matter

FROM THE BOARD CHAIR AND EXECUTIVE DIRECTOR

Some of the most brilliant ideas start with the words: “what if...?” Every day we can look down at our mobile phone and see the amazing result of Dr. Martin Cooper posing a what-if question in 1973 while he was working for Motorola.

In 1994, four local people who cared a great deal about our north county region asked four “what if” questions:

- **What if** there was a community foundation just for those living in the northernmost region of San Diego County that supported various nonprofit organizations?
- **What if** was a constantly growing, thriving foundation fueling special initiatives, urgent needs, scholarships, and supporting causes to help make a lasting difference?
- **What if** those who loved their local community could invest in a community foundation to “pay it forward” to help others thrive long after they were gone?
- **And what if** there was a foundation that could function in a stewardship capacity, mentoring nonprofit and community leaders, and managing endowments to support other charities?

These questions were posed by Helen Monroe, Jon Frandell, Fred Vaught, and Michael Dunlap. At the time, their ideas were ambitious. Each wanted to find a way where all facets of life for those living in neighboring areas could be improved by safety nets of care for generations to come. Bold thinking for sure. But they were energized by Ms. Monroe, a pioneer in community foundation development. Still professionally active, Ms. Monroe now has more than five decades of leading such noble thinking as well as teaching, mentoring, and overseeing two statewide endeavors in Michigan and Indiana to establish a multitude of community foundations.

Rounding out the brain trust of this band of forward-thinkers was Jon Frandell, a longtime investment advisor, previously with Merrill Lynch and now with Wells Fargo Advisors, Fred Vaught, an asset manager, and Michael Dunlap, a highly regarded CPA in Escondido recently re-elected as a Board

Director. Each of them brought their A-game in terms of experience, expertise, and enthusiasm to the endeavor.

Legacy Endowment Community Foundation – formerly The Community Foundation of North San Diego County – formed its first Board of Directors in 1994. Today, Legacy has grown its endowment and management base to more than \$16.5 million* and in the past 26 years, has awarded more than \$9.4 million in grants and scholarships.

As the 2020 pandemic continued into 2021, we found new and renewed ways to make connections solid, sustainable, and robust. New board members were recruited to deepen relationships through-out the area and beyond. CONNECT, our monthly news brief was introduced to deliver relevant news, and our social media channels were revitalized. All of these communication outlets and information resources are being built and re-built around YOU, with the needs of our community and growing region in mind.

It is our sincere hope this report provides greater insight into Legacy’s work in supporting a multitude of charitable partners who fill the humanitarian needs of our area. We truly appreciate our donors, volunteers, community leaders, and friends who promote Legacy.

Last but not least, we celebrate the vision and tenacity of our founders who launched a bold vision that a quarter-century later, continues to support all the vibrant, historic, community-centered, and cultural aspects of this beautiful north county region.

Rachel Mason
Board Chair

Jean Larsen
Executive Director

2021/2022 BOARD OF DIRECTORS

Michael Dunlap
Laura Holck
Rachel Mason
Roy Moosa

Marianne Martini Nolte
Matthew Obermueller
Wallace Tucker

*Legacy’s investment pool will vary each day in response to investment market fluctuations. At the time of publication, this is the best figure representing our current investment pool.

\$611,896
total granted

42 grants were made in
calendar year 2021
through our competitive
grants process



\$37,470 in
Scholarships
awarded

\$16.5 million*
in assets under
management

More than \$9.7 million in
total distributions made
since Legacy Endowment's
founding in 1994



1.5% annually
reinvested in
corpus growth



\$14,120

Distributed as out-of-cycle
Community Fund grants to for
COVID relief support

\$51,853 provided
as Charitable
Remainder Trust
distributions



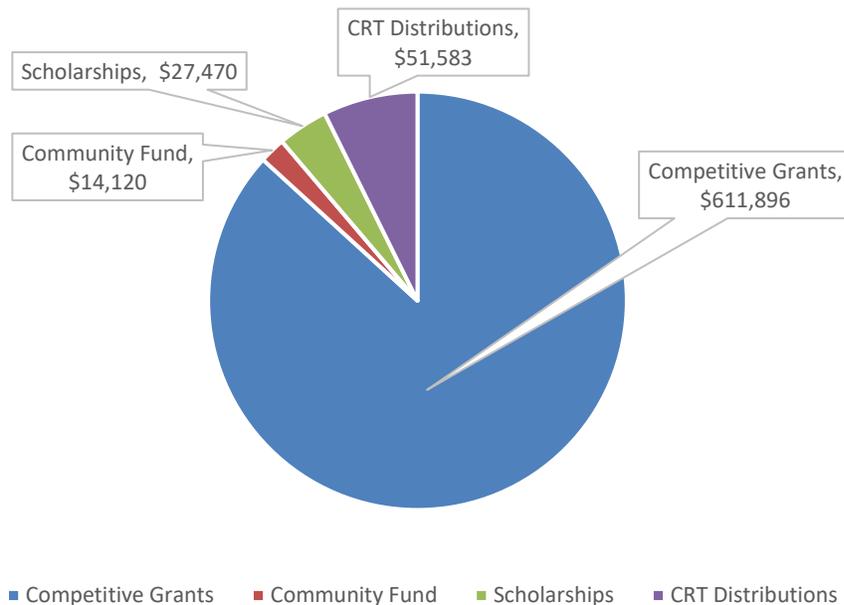
Trusted and
Distinguished
Investment Firms

Merrill Lynch
LourdMurray Delphi
Wells Fargo Advisors

*Market fluctuations will cause dynamic changes on a monthly basis. At the time of this report, our Board of Directors deemed this number to be representative of our general financial asset position.

2021 FINANCIAL REPORT

Total Dollars Distributed and Awarded in 2021



Grants are awarded through an annual competitive process whereby a committee comprised of various community leaders, students and civic volunteers review applications. Jan Pichel, Programs Officer, and Board Director, Laura Holck led the effort this year. We wish to thank: Yadira Duran, Karen Estes, Peter Fellios, Laura Holck, Carter Moe, and Ken Munson for the gift of their time in reviewing, assessing, and recommending this year's grant recipients.

PHILANTHROPY SPOTLIGHTS

Grantee Highlight: Camp Wamp

Camp Wamp serves between 100 to 120 children with physical disabilities each year, providing them with a complete life changing experience. The 5 one-week sessions every July and August enable these children unique opportunities to sleep under the stars, fish, swim, hike, learn arts and crafts, and immerse their minds and bodies into the full scope of camping with adaptations to meet the abilities of each of their campers. Each camper is paired with their own counselor who helps them with participation adjustments, feeding, medication or other personal needs.

Children with varying disabilities such as Cerebral Palsy, Muscular Dystrophy, Paralysis, and amputations are surrounded by their peers with similar life challenges. Daily activities include a curriculum covering Science, Technology, Engineering, Art, and Mathematics. But perhaps the most empowering activity is the rock-climbing wall. Through a collaboration with Mark Wellman, a mountaineer since age 12 who survived a paralyzing accident in 1982, disabled children can experience the thrill of "reaching the top" of a 30-foot wall. It's a feat of accomplishment that builds confidence, optimism, self-reliance, and ambition.

Founded by Stephen Wampler, one of the first two things you'll notice about Stephen is his most engaging smile, and that he is in a wheelchair. In his own words being born with Cerebral Palsy is, "Irrelevant!" Over the years he has learned to survive and thrive. He wants to ensure that others with physical disabilities have the same opportunity as he has had so they can live a fulfilling life, striving to accomplish all they can, empowered by determination, spirit and purpose.

Donor Highlight: Roy Ansell

Iconic. It is a word often associated with someone who has become the very symbol of achieving an enduring stature in life accomplishments. Here at Legacy Endowment Community Foundation, we think it is a word that best describes Roy Ansell.

The bedrock of such enduring stature starts with Roy's life, shaped by the 36 years working for *Alcoa* with decades of international travel providing a macro-lens for viewing a larger world. It also came from decades of Rotarian service modeling "service above self" and the 4-Way Test. And, as important, it certainly came from 63 years of marriage to Joyce and bringing up their children, Lindsay, Adrian, and Michelle. Longevity meant everything to Roy.

Roy's leadership remains an integral part of Legacy Endowment, forged by his fierce commitment to "donor intent" during the Foundation's formative stage. He believed donors needed a place to position their financial legacy in a way that their wishes would always be carried out in perpetuity. As the founding board of directors created its organizational structure, there would always be a pause from Roy to look at everything from the donor's perspective. His resolve of protection for future clients still resonates today, and because of this donor-centric mantra, philanthropic integrity and longevity clearly endures.

Our community lost Roy Ansell in 2014, but his legacy carries on through The Roy and Joyce Ansell Family Fund, which provides a blanket of support for the community he loved with access to – in perpetuity – grants that support programs/services for veterans and his beloved sport, Rugby.

Scholarship Highlight: The Duke Snider Fund

In any particular minute of any particular day, thousands of references can be found on the internet about Baseball Hall of Fame player, Edwin Donald "Duke" Snider. Statistics may record his love of the game carved out over many decades, documenting a stellar career primarily playing as a center fielder for the Brooklyn/Los Angeles Dodgers. After finishing his last season in 1964, he easily transitioned to new roles as a baseball scout and manager until finding his calling as a local sports analyst and commentator. In the last season of his life, Duke had plenty to do on his Fallbrook Avocado farm, and plenty of thoughts on how to give back to the community that welcomed him, his wife Beverly and their four children to the San Diego North County.

Some will remember his Duke Snider Lanes in Fallbrook for the happy times with Duke hosting graduation and birthday bowling parties. Others will remember his personal time and financial support to various baseball teams and athletics in general. Many will recall his participation and help in championships, tournaments, fundraisers, planning committees, 1:1 coaching sessions and all the many ways he just made people feel special.

For such a person who had giving back and supporting others always on his mind, Legacy Endowment will now carry forward a torch in his name, forming the new ***Duke Snider Scholarship Fund***. Beginning in fall 2022, high school graduates from Fallbrook, Bonsall, or Mission Vista High School may apply for an extra measure of support needed for college. We are exceptionally grateful to his family for choosing us to organize this fund as a tribute to Duke, helping others follow in his footsteps, cleats and all.

Named Family Funds

Ansell Family Fund
Beverly Lawson Women's Athlete Fund
Boukouzis Family Fund
Charles and Carole Mitchell Endowment Fund
Deranian Family Fund
Elisabeth Wilson Endowed Fund
James S. Hopson Endowed Fund
John Gawley Endowed Fund
Viola McDowell Endowment Fund

Board Designated Funds

Legacy Community Fund
Out of the Ashes Fund

Notable Beneficiaries

4Paws 4Patriots
Children's Hospital Los Angeles
Dollarhide Cemetery
E.H. Angle Foundation
Elizabeth Hospice
Fallbrook Chamber of Commerce
Fallbrook Food Pantry
Fallbrook Senior Service Club
Foundation for Senior Care
Dougherty & Tanaka Orthodontic Foundation
Good Dog
The Huntington Library
K9 Guardians
Rady Children Hospital San Diego
Roads-B and G Club of Oceanside Program
Salvation Army-San Diego
San Luis Rey Mission Parrish
San Marino Community Church
Sanford Burnham Institute
Son Rise Fellowship
St. Madeleine Sophie's Center
University of Redlands
WAVES

Agency/Charitable Partner Funds

American Association of University Women
-Fallbrook Branch
Bonsall Fund for Social Change
Boys and Girls Club Foundation
Cabin by the Lake
D'Vine Path
Fallbrook Aquatics
Fallbrook Land Conservancy/Palomares
Fallbrook Land Conservancy/Red Mountain CE Defense
Fallbrook Land Conservancy/Save our Forest
Fallbrook Music Society
REINS Therapeutic Horsemanship Program
Father Francois Beyrouti Educational

Scholarship Funds

American Association of University Women Fund
Roberta Collister Fund
Michael Pancer Memorial Fund
Ridgecrest Family/Rising Star
Duke Snider Fund
Juanita Walden Fund
Jesse T. Yount Fund

**FEELING INSPIRED? You can start
your own personal giving plan now.
It's never too early to plan...
or to start!**

Legacy Endowment can help by providing current information on charitable tax advantages and the many types of funds that benefit you and your charities of choice. Please call upon us to help with creating your own personal charitable giving plan and associated goals.

Legacy Endowment... The Community Foundation is a resource for individuals who want to raise the bar on the impact of their giving in the most long-term manner possible. Legacy Endowment is also an excellent resource for nonprofit organizations who desire prudent investment growth and asset management in order to make generous distributions for highest and most urgent needs, and/or to fund scholarships.

Founded in 1994, Legacy Endowment is a tax-exempt public charity that provides options for donors who want to carry out personal and family-based charitable intentions while maximizing tax advantage options to help nonprofit organizations carry out their programs and services.

Visit our website at
Legacyendowment.org
980 S. Mission Rd., Suite 1210 | Bonsall CA 92003

Legacy Endowment Community Foundation is a tax-exempt public charity under Section 501(c)(3) of the Internal Revenue Code.

We are a current member of the Council on Foundation and proponents of the Association of Fundraising Professional's Donor Bill of Rights.

Current audited financials are available upon request and posted for review on our website.