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# Update to GHCF Donors



GREATER HOUSTON  
COMMUNITY FOUNDATION

*Smart giving. Better results.*

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October 2007

## Letter from the President

Dear Donors & Advisors:

Enclosed please find the third quarter statement for your fund here at the Greater Houston Community Foundation. Please note that in addition to mailing out your statement, we are now posting a copy online which you can access through Advisor Express.

With regard to the investment of your fund, the default allocation had a 1.09% return for the quarter and 8.54% year-to-date. The return for your fund will vary based upon the specific asset allocation of your fund. In the past few days, you should have received an asset allocation form for your fund that allows you to adjust your asset allocation if you choose to do so. You will have this opportunity on a semi-annual basis. The default portfolio is now fully populated under its current structure, with the inclusion over the past several months of an absolute return pool and a real asset pool. As noted in materials we have sent out over the past several years, you may want to design your own asset allocation to coincide with your investment time horizon; the default portfolio, with a 65% equity exposure, is designed for a long-term horizon (e.g., ten plus years); you might consider a different allocation if you intend to turn over the dollars in your fund more rapidly.

We are continuing to build our DonorHouston online database, with over 500 profiles now online. We are making good progress in our effort to roll out the next version of DonorHouston, which will make it easier and more efficient for both users and our nonprofit participants. We hope to have the initial version of this system operational by the end of the year. We have also raised over half of the funds necessary to fund this and related activities through calendar year 2008.

As we move into the busy season for charitable giving, please remember how easy it is to add assets to your GHCF fund. In addition to cash and publicly traded stock, we are able to accept a wide range of non-publicly traded assets. If you are interested in making such a gift, please contact us to discuss the details. We will be sending out a brochure shortly that will reflect the deadlines for various types of donations in order to have your gifts count for tax year 2007.

Thank you for your continuing support of GHCF!

Stephen D. Maislin, President

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## **GHCF Ranks in Top 100 Community Foundations in US**

The 2006 community foundation survey numbers have just come out. Thanks to the support of you, our GHCF donors, in our eleventh year of operation we are now the 49th largest community foundation in the United States (out of a total of approximately 700 such foundations). We continued our upward movement on the list from ranking 50th in 2005.

In 2006, we ranked 17th in the US in new gifts into GHCF (\$70,166,222), and 15th in grants out (\$56,577,872), which means that our donors are continuing to invest their charitable dollars on a very active basis in the Greater Houston area and beyond.

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## **Donor Advisor Xpress Features – Researching by Program Area**

We recently updated the Donor Advisor Xpress database with the names of the nonprofit organizations that have received grants from the Greater Houston Community Foundation donor advised funds in the last two years. You can search for an organization by name or by program area (i.e. arts, health, education, etc.). Once you see the name of the organization that you wish to send money to from your fund, simply click the “Make a grant” link that is on the same line as the organization and it will pull all the nonprofit organization’s information into the grant recommendation form automatically.

You can also submit a grant request through Donor Advisor Xpress to be made to a nonprofit organization that is not listed in our system as long as you send their address, contact person, phone number and/or email address to enable us to follow through and verify their IRS status. Additional information on nonprofits may be found in our DonorHouston database which may be accessed through our GHCF website.

For assistance with your online grantmaking, please contact the Donor Services Department at 713.333.2210.

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## **Plan Now for Year-End Giving**

Gifts of appreciated stock can be extremely beneficial – both to you and to the charities you support through GHCF. As you evaluate your portfolio, why not consider the benefits of gifting low-basis stock that has increased in value? You receive an income tax deduction for the full fair market value of your stock and avoid recognition of the potential capital gain.

Remember to plan early – transfers of stock, mutual funds and real estate can take time and must be completed before December 31 in order to claim a 2007 charitable deduction.

To learn more about how GHCF can help you achieve your year-end goals, call Bob Paddock or KC Eynatten. See their contact information in the list of staff members.

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## **Has your e-mail address changed?**

Please keep us informed of e-mail address changes by sending new information to Christina King at cking@ghcf.org. We occasionally send e-mails to our donors regarding special events, so please send Christina your e-mail address if we don’t have it. We promise to use it sparingly!

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## **GREATER HOUSTON COMMUNITY FOUNDATION**

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