



## PARTNERS IN PHILANTHROPY

### **AGENCY ENDOWMENT FUNDS**

Nonprofit organizations establish an Agency Endowment Fund to grow assets to meet both current and future needs. The Foundation Board of Directors and staff manage the investments and administrative details of the endowment. This service frees the nonprofit to focus upon the community.

Alabama Coastal Foundation Endowment – 2003  
Alabama Eye Bank Endowment Fund – 1987  
Alabama Forest Resources Center Funds – 2003  
Alabama Forest Resources Center Funds – 2008  
Alabama School of Math & Science – 2001  
America's Jr. Miss Scholarship Endowment – 1999  
Beth Zur & B'nai B'rith Fund – 1994  
Bishop State Community College Alumni – 1983  
Camp Rap-A-Hope Endowment Fund – 1986  
Catholic Social Services Fund – 1983  
Child Advocacy Center Endowment Fund – 1995  
Child Care Resources for South Alabama Fund – 1996  
Child Day Care II - Endowment Fund – 1987  
Friends of Daphne Library – 2003  
Dearborn YMCA Fund – 2002  
Deep South Girl Scout Council Fund – 1984  
Drug Education Council Endowment Fund – 1987  
Fairhope Educational Enrichment Foundation – 2006  
Fairhope Educational Enrichment-Peter Wiese – 2006  
Goodwill Industries Endowment Fund – 1985  
Gordon Smith Center Inc. Fund – 1994  
Robert V. Jacobs Endowment Fund – 1993  
Jewish Family Services of Mobile Endowment – 1998  
Mercy Medical Endowment Fund – 2003  
Mobile AIDS Support Services Foundation – 1996  
Mobile Association For Retarded Citizens – 1991  
Mobile Ballet, Inc. Fund – 2004

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Mobile County Board of Health Fund – 2004  
Mobile Museum of Art Endowment Fund – 1992  
Mobile Preschool For Sensory Impaired – 1984  
Mobile Public Library Endowment Fund – 1989  
Montrose Cemetery Association Foundation – 2004  
Senior Citizens Services Endowment – 1981  
J S Sheldon Endowment – 1994  
Spanish Fort Education Enrichment Foundation – 2004  
St. Paul's Episcopal School Endowment – 2002  
St. Pius X Catholic Church Endowment – 2003  
St. Pius X School Endowment – 2001  
Turtle Point Environmental Science Center – 2002  
Howard Mahan Unitarian Universalist Fellowship – 2008  
Victory Health Partners Fund – 2006  
Waterfront Rescue Mission Fund – 1995  
Weeks Bay Reserve Foundation – 2004  
B.R. "Babe" Wilson Fund-Daphne Boys & Girls Club – 2003  
YMCA of Metropolitan Mobile Inc. Endowment – 1998

### **CHARITABLE GIFT ANNUITIES**

A charitable gift annuity is a way to make a gift to your favorite charity, and still receive an income for yourself or others. It is a contract under which the Foundation, in return for a transfer of cash or other property, agrees to pay a fixed sum of money for a period measured by one or two lives. Remaining funds will be placed in a charitable fund of your choice.

Joanne Bolling Charitable Gift Annuities – 2006  
Milton G. Bolling III Charitable Gift Annuity – 2007  
Katherine Cane Charitable Gift Annuity - 2009  
E.M. & Mary B. Charlet Charitable Gift Annuity – 2006  
Robert & Patricia Edington Charitable Gift Annuity – 2006  
Ellen I. Geheeb Charitable Gift Annuity – 2006  
Julia H. Geheeb Charitable Gift Annuity – 2006  
James & Gloria Griffin Charitable Gift Annuity – 2007  
Robert O. Harris III Charitable Gift Annuity – 2004  
Myrtle I. Jones Charitable Gift Annuity – 2004  
Alex & Gloria Landi Charitable Gift Annuity – 2004  
K.M. O'Neal Charitable Gift Annuity – 2001  
Joan Ralph Charitable Gift Annuity – 2008  
George Schroeter Charitable Gift Annuity – 2007  
Ruth Seibels Charitable Gift Annuity – 2007  
Richardine Shackelford Charitable Gift Annuity – 2006  
M. B. Steadham & J. W. Hall Charitable Gift Annuity – 2007  
Bill & Derthia Taube Charitable Gift Annuity – 2006  
Helen Thomas Charitable Gift Annuity – 2006  
John van Aken Charitable Gift Annuities – 2006  
John van Aken Charitable Gift Annuity - 2008  
W.K. & A.P. Weaver, Jr. Charitable Gift Annuities – 2002

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J.L. & R.K. Williamson Charitable Gift Annuity – 2003  
Alvan & Susan Witek Charitable Gift Annuities – 2006

### **COMMUNITY ENDOWMENT NAMED FUNDS**

Donors can address the most urgent needs of the community through Community Endowment Named Funds which allow the Foundation to address emerging community challenges. Donors place no restrictions on how their funds are used and decisions are left to the Board of Directors. These funds are the most timeless in terms of community impact. Donors entrust the Foundation with the selection of projects to receive grant funding.

Hank Aaron – 1978  
Alabama Power Foundation – 2001  
AmSouth Bank – 2001  
Baldwin County – 2006  
Charles Barkley – 2008  
The Batchelor Fund – 1998  
Walter and Loresa Bell – 2001  
Book of Memory – 1976  
David Christopher Coley – 1994  
Community Endowment Fund – 1992  
Crampton Trust – 2001  
Alfred F. Delchamps Sr. – 1991  
Ann & Fred Delchamps Jr. Memorial – 1989  
Oliver H. Jr. & Otilia M Delchamps – 1992  
Frank P. Ellis – 1980  
Founder's Society Fund – 1976  
Kenneth R. & Zelma M. Giddens – 2000  
Hand Arendall – 2001  
John & Mila Hendon – 1976  
R. Lloyd & Annie Meaher Hill – 1989  
Edward A. Hirs Sr. – 1989  
Dennis Howard – 2005  
Mary Jane Huffman – 1986  
Walter N. Ingram – 1995  
Jeannette G. & Julius Kretzer – 1983  
Lippincott Warren Honorarium – 1983  
William A. & Marilyn Lubel – 2004  
Phil & Katherine Maher – 2001  
Jay Maisel Memorial – 1994  
Jean & Julius Marx – 1981  
Ben May Charitable Fund – 2001  
J. Finley McRae – 1983  
Wayne D. McRae – 2006  
Meisler Family – 2006  
Metcalf Fund – 2006  
Mitchell Fund – 1992

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W. Davis Pilot Jr. – 2007  
Regions Bank – 2001  
Ogden Shropshire – 1991  
Jean and Jack Smith – 1992  
Sybil H. Smith – 2001  
South Trust Bank – 2001  
Melvin & D.C. Stein – 1995  
Strauss Charitable Undesignated Fund – 2009  
Mae Ellis Taul & Frank P Ellis Jr. – 2001  
Waterman Family – 2001  
Peggy & Blacksher Whitespunner – 1994  
Roy Wilkie – 1982  
Jacque & Robert Williams Jr. – 1992

### **DONOR ADVISED FUNDS**

These funds are charitable giving alternatives that are managed by the Foundation on behalf of an organization, family or individual. Advised Funds are established by donors who wish to actively participate in the grant-making process. Individuals, families and corporations recommend charities they want to support through the advised fund they establish. It is easy to give to multiple nonprofits through an advised fund.

Angels Arms Animal Welfare Fund – 2009  
The Alabama Romanchuk Fund - 2008  
Anonymous Charitable Fund I – 1984  
Anonymous Charitable Fund III – 1986  
Anonymous Charitable Fund IV – 1989  
Anonymous Charitable Fund VI – 2004  
The J. L. Bedsole Foundation Fund – 2005  
Walter A. & Loresa Bell Charitable Fund – 1993  
Joseph Barr Biggs Charitable Fund – 2007  
Margaret Cooper Biggs Charitable Fund – 2007  
Sarah Knox Biggs Charitable Fund – 2007  
Porter & Shirley Brock Charitable Fund – 1986  
Cane Family Fund – 2009  
Cape Charitable Fund – 2000  
Fred & Ann Clark Charitable Fund – 1995  
Commonwealth National Bank Fund – 2004  
Beverly & J. Gary Cooper Charitable Fund – 2004  
David J. Cooper, Jr. Charitable Fund – 2007  
Cottage Hill Sponsorship Fund – 2004  
S. G. Crawford Charitable Fund – 1994  
John and Brenda Davis Fund – 2007  
Ann & A.F. Delchamps Jr. Charitable Fund – 1981  
Oliver H. & Otilia M. Delchamps Jr. Fund – 1983  
Diabetic Children of Alabama, Inc. Fund – 2007  
Michael C & Patsy B Dow Charitable Fund – 1986  
A. Owen III & Kathryn Wilburn Drey Fund - 2005

Carolyn & Bernard Eichold Fund – 1997  
Eichold Family Foundation Fund – 2002  
Fasquelle-McKean Charitable Fund – 1988  
Robert & Terrie Foster – 2008  
Gulf Shores Title Charitable Fund – 2006  
Doris C. & Robert M. Hodgson Fund – 1997  
Elsie Lyons Holmes Charitable Fund – 2007  
John Jacobson Family Foundation Fund – 1997  
Sally & Vivian G Johnston Jr Charitable – 1986  
John H & Myrtle I Jones Charitable – 2004  
Kaiser Family Fund – 2000  
Michael S. Kennedy Fund – 2005  
Stillman D. Knight Fund – 1986  
Allen H. Ladd Fund – 2003  
Leslie & Edward B Ladd Charitable Fund – 2002  
Russell Ladd Fund – 1999  
The Larkspur Fund – 2007  
Ashleigh Cooper Leland Charitable Fund – 2007  
Cooper Knowles Leland Charitable Fund – 2007  
Mary Stadther Leland Charitable Fund – 2007  
Thomas Mikell Leland III Charitable – 2007  
Jean F. & Julius E. Marx Fund – 1996  
Mathews Trust – 1997  
Ben May Memorial Fund – 1985  
Wayne D. McRae Fund – 1997  
Melton Family Fund – 2004  
Mendenhall Charitable Fund – 1998  
Metcalf Charitable Trust – 2004  
Mitchell Company Charities – 1983  
Mayer & Arlene Mitchell & Abraham A. Mitchell – 1980  
Marguerite & Patrick O'Malley – 1998  
Prodisee Pantry Fund – 2005  
Regions Bank Community Fund – 1980  
Helen M. Rester Charitable Fund – 1994  
Dr. Gary & Mrs. Jenny Rich Fund – 1995  
Ripps/Meisler Charitable Fund – 1982  
Edna H. Rivers Charitable Fund – 2007  
RLM Trust – 2008  
The Romanchuk Fund – 2006  
The Alabama Romanchuk Fund – 2007  
Scott & Ruth Rye Charitable Fund – 2007  
Marion B. Sanders Charitable Fund – 2006  
Sapling Charitable Fund – 2001  
The Seifert Fund – 2003  
Gordon Smith Sr. Memorial Fund – 1985  
Jean & Jack Smith Charitable Fund – 1986  
Patti and Lee Smith Memorial – 2005  
Teresa & Norvelle Smith Fund – 1997

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Melvin Stein Charitable Fund – 2005  
Sandy & Jean Stimpson Charitable Fund – 2004  
William C. Sturgeon Program Development – 2005  
William J. Suffich Family Fund – 2006  
Thompson Holdings Foundation Fund – 2004  
Trufant Family Charitable Fund – 2003  
Volkert and Associates Charitable Fund – 2003  
Weeks Bay Foundation Lifetime Membership – 2007  
White Oaks Foundation Fund – 2007  
The John Roy Whitehead Fund – 1999  
J & R J Williams Fund – 2003  
Wingard Charitable Fund – 2004  
Wintzell's Restaurants Fund – 2005  
Women's Fund of South Alabama – 2003  
Helen A. Young Charitable Fund – 1995  
Youth Grant Allocation Board Fund – 2007  
Kela and Harry Zarembo Charitable - 2003

### **DONOR RESTRICTED FUNDS**

These charitable purpose gifts are subject to restrictions or conditions imposed by the donor as to how the gifts may be used.

Alabama Power Endowment for United Way – 1999  
Arthritis Foundation 'Camp Mash' Perpetual – 2005  
Bendel Family Fund – 1996  
Doris Bender Executive Development Fund – 1994  
Lance Bodden Award Mobile Rotary Club – 1994  
Boys & Girls Clubs Endowment – 2001  
Leslie J. Bullen for Waterfront Rescue Mission – 1995  
Venetia B. Butler Fund – 1980  
Hettie Hopkins Murchison Camp Rap-A-Hope – 1989  
Cardiac Therapy Inc. Endowment Fund – 1986  
Child Advocacy Center Endowment – 2001  
Clarke Co. Historical Society Endowment – 2001  
Community and Economic Development - Ford Fund – 2006  
Compassionate Friends Community Fund – 2000  
Cottage Hill Foundation Fund – 2000  
John D. and Myriam Crosby Fund – 1998  
DISL Foundation George F Crozier Endowment – 2001  
Delchamps Incorporated Charitable Fund – 1978  
Disaster Relief Fund - 2008  
Virginia Delchamps Fund – 1983  
Allen Dudley and Travis Johnson Fund–1996  
Dumas Wesley Community Center Endowment – 2001  
Dumas Wesley Community Center Fund – 1992  
Eastern Shore Art Association Endowment – 2001  
Elevator World Incorporated Charitable Fund – 1987

Escambia Co. Hospital Endowment – 2001  
Noel E. Evans Fund – 2008  
Fairhope Educational Enrichment Endowment – 2001  
Alma & Anthony Fisher Concert Endowment – 2003  
The Forum Air Fund – 2000  
DHR-Foster Care Endowment – 1982  
Gene Fussell Memorial Award Fund – 1982  
Gulf Coast Child Care Foundation – 1996  
The Hadassah Fund – 2000  
Joseph M. Hocklander Legal Fund – 1978  
Walter N. & Maudine H. Ingram Fund– 1995  
Kaufman-Dauphin Way United Methodist Church – 1996  
Kaufman-Community Foundation Newsletter – 1996  
Ruth and Bill Kaufman Charitable Fund – 1996  
Porter King Jr. Charitable Fund – 2003  
Ray C. Kirkpatrick Fund – 1997  
Kiwanis Endowment Fund – 1997  
L. Pritchett & W. Gamble Memorial – 2004  
Lions and USA Eye Research Endowment – 2001  
Lockwood Harless - Waterfront Rescue Mission – 1995  
Main Street Mobile Endowment – 2001  
Harry & Lula M. McCarn Fund – 1988  
McDonald Education Fund – 1991  
McGill-Toolen Foundation Fund – 2007  
Mitchell's Place Fund – 2005  
Mobile Arts Council Endowment Fund – 1982  
Dow Endowment For The Mobile Arts -1999  
Mobile Association for Retarded Citizens – 2001  
Mobile Museum of Art Endowment – 2001  
Dow Endowment for Mobile Opera – 1991  
Mobile Opera Endowment – 2001  
Mobile Public Library Capital Campaign – 2001  
Mobile Symphony Endowment – 2001  
Mobile United Endowment Fund – 1981  
Most Pure Heart of Mary Fund – 1998  
Mulherin Custodial Home Endowment – 2001  
Multiple Sclerosis Fund – 1983  
Museum of Mobile Fund – 2008  
Friends of Oakleigh Endowment Fund – 1991  
One Hundred Black Men Fund – 2006  
Penelope House Endowment – 2001  
Presbyterian Retirement Corp. Endowment – 2005  
Project CATE Foundation, Inc. Fund – 1995  
Recovery Fund – 2005  
Riddick - Mobile Museum of Art – 1992  
Robert Wood Johnson Foundation Fund – 2007  
Ronald McDonald House Endowment – 2001  
Rotary Conservation Education Fund – 1990

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Service Center of Catholic Social Services – 1999  
Donald Smith Sr. Memorial Fund – 1986  
Spring Hill College Endowment – 2001  
St. James Major Catholic Church – 1998  
St. Mary's Home Endowment – 2001  
Strauss Charitable Foundation Fund, Edith Murphy – 2009  
Mary Sands Sturgeon Memorial – 1993  
Endowed Annual Gift Fund of United Way – 1996  
University of South Alabama Endowment – 2001  
USS Evans Fund – 1983  
Constantine E. (Deanie) Vacalis Memorial – 1986  
Weeks Bay Foundation Legal Defense – 2008  
WHIL Endowment Fund – 1981  
LaVisa Wilson Memorial – 2000  
Edith G. and Edwin A. Zelnicker, Jr. - 1985

### **FIELD OF INTEREST FUNDS**

Donors can specify a particular field of interest that they would like their gifts to support. Income from these funds are used to support programs at the discretion of the Board of Directors, but only in specific fields of charitable concerns as determined by the donors.

Alcoholics Recovery Fund – 1994  
Josephine Dorgan Carney Fund – 1978  
Chandler Capital Campaign Fund – 1992  
Bertha Marie Dorgan Fund – 1991  
John A. & Mary A. Dorgan Fund – 1977  
Irene P. Kay Charitable Fund – 1993  
Lester Kay Charitable Fund – 1993  
Dillon & Virginia S. March Endowment – 2006  
Medical Interest Fund – 2001  
Mobile County Public School Endowment – 1991  
Clyde C. Snyder Arts & Cultural Music - 2002

### **POOLED INCOME FUNDS**

These funds are comprised of gifts that are pooled and invested together. Income from the fund is distributed to the donor. Remaining funds will be placed in a charitable fund of your choice. Pooled income funds allow you to ensure a perpetual income, claim a current tax deduction and make a future gift to charity.

Louis M. Finlay Jr. – 1996

## **SCHOLARSHIP FUNDS**

Donors establish Scholarship Funds to help students achieve their education goals by providing grants for college or university tuition, room and board. Donors are involved by defining candidate eligibility, selection and award use.

Carolyn Smith Adams Scholarship – 1988  
Ann St. Baptist Church Memorial II – 1986  
Charles B. Arendall Scholarship Fund – 1987  
Arendall/Boone Fund – 1987  
T. Massey/Martha Bedsole Scholarship – 1988  
Colleen & Kenneth Bergdolt Scholarship – 2004  
Constance S. Bolton Scholarship Fund – 2000  
Paul J. Bueche Memorial Fund – 2005  
Kinsley Elizabeth Bulger Memorial Scholarship – 2007  
Lucille Burson Scholarship Fund – 1987  
Chadwick David Chesser Salutatorian – 2007  
Chi Alpha Academy Fund – 2006  
David Christopher Coley Memorial – 1987  
C. V. Daniels Memorial Scholarship – 1999  
Edmund L. Deasy Scholarship – 1987  
Alfred F. Delchamps Sr. Memorial Fund – 1981  
W. C. & Jeanette Dobbs Lectures Fund – 1987  
Brad Douglas Memorial Scholarship Fund – 1985  
Anita S. Edwards Scholarship Fund - 2000  
Jack Edwards Scholarship Fund – 1984  
Sam & Charlotte Eichold Endowment Fund – 1987  
Orline Florey Endowment Fund – 1986  
Roland and Jean Fry Scholarship – 1999  
Samuel Willard Gates Scholarship Fund – 1986  
Beulah and Thelma Goode Scholarship Fund – 1994  
Dr. Escous Blackwell Goode Scholarship – 1994  
Charles Hand Scholarship Fund – 1980  
Wendell Hart Scholarship Fund – 1986  
Emily Staples Hearin Scholarship – 2005  
Gavin "Gee" Hunter Agricultural Scholarship – 1998  
Al & Molly Kahn Scholarship Fund – 1988  
Kathy P. Knight Scholarship Fund - 1999  
Evie L. Kohen Scholarship Fund – 1986  
Charles Lang Christian Leadership Scholarship – 2006  
Sue & Sidney Magnes Scholarship Fund – 1983  
Rev. C. R. Maples Memorial Scholarship – 1987  
Martin/Scrivner Scholarship - 1984  
Roy F. Martin Scholarship Fund – 1986  
Thomas T. Martin Scholarship Fund – 1986  
Mathews Scholarship Fund – 2007  
Hooper W Matthews Jr. Forestry Scholarship – 2007  
Ben May Scholarship Fund – 1989  
Dr. Charles & Patricia May Scholarship – 1994

Harry & Lula McCarn Retired Nurses – 2003  
Harry & Lula McCarn Nurses' Scholarship – 1998  
Wayne D. McRae Scholarship – 2003  
Mobile Society/Human Resources – 1983  
Murphy Alumni Association, Inc., Curtis Williams – 2008  
Murphy High School Class of "31" Scholarship – 1989  
H. Austill Pharr Memorial Fund – 1987  
Pat Piercy Education Trust Fund – 2000  
Point Clear Rotary Club Scholarship – 1996  
Mary & Council Powell Scholarship Fund – 1998  
Dick Robertson Scholarship – 2004  
Dorothy S. Saad Nursing Scholarship - 1986  
Sara King Shepard Memorial Scholarship - 1986  
Gus Shopoff Scholarship Fund - 2007  
Spring Hill College Class of '51 Scholarship – 1996  
Mary W. Steedley Scholarship Fund - 1987  
Thompson Holdings Foundation Scholarship - 2007  
University of Mobile Scholarship – 1997  
Fannye Utsey Memorial Scholarship Fund – 2006  
Anne Parker Weaver Davis Scholarship – 2007  
W K Weaver Jr. Endowment Scholarship – 1985  
Roy R. Wilkie Scholarship Fund - 1982  
Patricia Boyd Wilson Scholarship Fund – 1987  
Joe Wayne Wright Jr. Scholarship Fund - 1992

## **SUPPORTING ORGANIZATIONS**

Supporting organizations are separate nonprofit organizations with applicable IRS tax exempt status. They have a separate board of directors and award their own grants. The Community Foundation of South Alabama provides professional management and oversight of all aspects of the supporting foundations' administrative, investment and grant making activities. A supporting organization can be an alternative to a private foundation or a donor advised fund.

Israel & Sylvia Goldberg Family Fund – 2000

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