

**ACTIVATE  
GOOD**



**IMPACT REPORT**  
————— 2023 —————

As we look to the next decade,  
Cobb Community Foundation has set a course  
to not just serve, but to be a **catalyst for a thriving Cobb.**

We're on a mission to activate good across our community, through  
**mobilizing people, ideas, and resources for the benefit of all.**  
Transforming vision into action.  
Multiplying generosity for greater impact.

We're not just funding the future;  
we're fueling a movement  
to empower and elevate every corner of Cobb.

With every initiative and grant, we ignite more good:  
Inspiring collective giving by an engaged community  
Empowering nonprofits to create change  
Sparking conversation, action, and innovative solutions to Cobb's greatest challenges  
Good that grows, multiplies, and resonates.

**We invite you to join us.**

**Engage with us.**

**Be the change with us.**

**Together, let's activate good for a stronger, more vibrant Cobb.**

**ACTIVATE  
GOOD**



# Dear Friends,

Over the past 30 years, Cobb Community Foundation has evolved. We began in 1993 as a small, local charitable fund held at a larger organization. In 2005, we launched as an independent community foundation and have grown into the nearly \$30 million organization we are today.

Through these transitions, we've maintained a single focus: to serve the area in and around Cobb. And, with your help, we've done great things. Your support has allowed us to serve Cobb as a nonprofit benefactor—what some might call a charitable bank and what others would describe as a master connector of needs and resources. And while we look forward to continuing to inspire charitable giving, building resources for the future, and connecting donors who care with causes that matter, we think we can do more.

With our connections, we are uniquely suited to become a catalyst in the community. Our new strategic vision, detailed on the following page, challenges us to take on that role and mobilize people, ideas, and resources to improve life in and around Cobb.

As the following pages attest, together, we've already accomplished so much.

**Now, let's ACTIVATE GOOD together!**



Kim Gresh, Chair  
S.A. White Oil Company



Shari Martin  
President & CEO

## 2023 Board of Directors

### Officers

**Kim Gresh, Chair**  
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Manager, Globalt, Retired

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**Terri Guthrie, Business**  
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**Steve Imler, Entrepreneur,**  
Retired

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Relations, Genuine Parts Company, Retired

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Gallery

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CEO, Cobb Chamber of Commerce

**Todd McMullen, CEO, Magnolia**  
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**Travis Reeves, Founder, Kids**  
Next Code

**Cheryl Richardson,**  
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**Carlos Rodriguez, Partner,**  
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**Gaspar Rodriguez, Retired**  
Marietta City Schools

**Trey Sanders, Regional**  
President, Brasfield & Gorrie

**Tracy Styf, Executive Director,**  
Town Center CID

**Ray Thomas, President,**  
Mableton Improvement Coalition

**Susan Tillery, President/Co-**  
Founder, Paraklete Financial, Inc.

### Founder

**Jim Rhoden Jr., Chairman,**  
Futren Hospitality

# CCF Creates New Vision and 5-Year Strategic Plan to Activate Good in Cobb



Cobb Community Foundation is proud to unveil our 2024-2028 Strategic Plan, which signifies a pivotal shift in our approach. Over the next decade, we will transform beyond our role as a “charitable bank” to become a **catalyst for a thriving Cobb**.

From June through December 2023, our board of directors and staff rolled up their sleeves to develop the plan, consulting community stakeholders, community foundation peers, and best practices in our field. The plan reflects a collective commitment to activate good by addressing the evolving needs of our community.

**We will mobilize people, ideas, and resources for the benefit of all through four areas of work:**

- **Collective Giving by an Engaged Community:** Generate significant growth in unrestricted and field of interest funds and planned gifts to support strategic grantmaking and community-driven initiatives.
- **Expanded Nonprofit Capacity:** Empower improvements in leadership, governance, and financial sustainability among key Cobb nonprofits and agencies.
- **Community Problem-Solving:** Coordinate efforts to define and prioritize community “Vital Signs,” and orchestrate collaborative solutions to key challenges.

- **CCF Organizational Effectiveness:** Build our operations reserve (Catalyst Fund), improve board engagement, maintain impeccable financial management, and upgrade technology for greater efficiencies.

Our 10-year goal is to become a \$100 million foundation with a significant percentage in unrestricted and field of interest funds so that we can support more strategic grantmaking and empower community-driven initiatives.

## OUR MISSION

**Be a catalyst for a thriving community—** mobilizing people, ideas, and resources to improve quality of life in and around Cobb.

## OUR VISION FOR THE COMMUNITY

**A thriving community of engaged, charitable citizens—**where all people can access opportunities and achieve their greatest potential.

## OUR RALLYING CRY

**Activate Good**

**Read the strategic plan**



# MOBILIZING PEOPLE & IDEAS



We spark conversation and action to advance innovative solutions to Cobb's greatest challenges.

## Introducing Foster Youth To A Tailored College Program

CCF played a pivotal role in connecting dreams to opportunities for the foster youth of Goshen Valley Ranch. By introducing Goshen Valley to the KSU CARE program at Kennesaw State University, CCF provided a tangible pathway for these young individuals to envision a highly supported college experience in KSU CARE's ASCEND houses, which specifically support youth who faced homelessness or foster care during high school.

This important connection happened when Goshen Valley Ranch staff and youth joined CCF staff and board on a tour of the ASCEND houses. This is just one example of how our "community connector" role can both create opportunities for individuals and strengthen our community.



## Providing Accessible Legal Advice

Chief Magistrate Judge Brendan Murphy hosted a Pop-Up Legal Clinic, offering invaluable assistance for those facing legal dilemmas. The clinic provided free advice on family law, landlord/tenant disputes, probate, small claims, bankruptcy, and immigration issues.

This project was a collaborative effort of CCF, Cobb Bar Association, Cobb Collaborative, Legal Aid, and Mableton Improvement Coalition. It helped many accomplish legal tasks they might not otherwise be able to handle on their own. Due to its success, preparations are already in motion for another clinic in 2024.



# MOBILIZING RESOURCES

We generate and steward significant funding for programs, needs, and ideas that enhance quality of life in Cobb.

**Total Grants Since 2005 Inception: \$20,897,235**  
**Assets as of Dec. 31, 2023: \$24,793,612**

## Cobb Thrives Gift Guide Helps Fulfill End-of-Year Wishes for 30 Local Nonprofits



For the holiday season, CCF introduced The Cobb Thrives Gift Guide—a new grant opportunity to support 30 local nonprofits to help them get difficult, end-of-year wishes fulfilled.

Nonprofits were asked to share requests that have been difficult to fund but have a big impact on carrying out their mission. Staff and trained volunteers reviewed and evaluated applications, ultimately selecting 30 organizations to be highlighted. The catalog was distributed in print and online avenues with assistance from the Marietta Daily Journal and Loud Security. CCF accepted charitable donations to fulfill these wishes, and CCF supporters provided \$15,000 in matching donations generating total incremental resources to these organizations of more than \$70,000.

Thank you to our project underwriters: Northwest Region of United Way of Greater Atlanta, Pinnacle Financial, SA White Oil, and Magnolia Trust.



| Organization  | Raised   |
|---|----------|
| Adult Disability Medical Healthcare                       | \$2,052  |
| Aloha to Aging  | \$2,230  |
| Artz for the Harp Corporation                             | \$1,050  |
| Atlanta Youth Tennis & Education Foundation               | \$1,500  |
| Autism Improvised   | \$2,603  |
| Automotive Training Center                                | \$126    |
| Blue Thanksgiving   | \$200    |
| Communities In Schools of Georgia in Marietta/Cobb County | \$1,892  |
| Four Corners Group  | \$2,145  |
| Georgia Kids Belong                                       | \$1,500  |
| Georgia Symphony Orchestra                                | \$7,000  |
| Heirborn Servants   | \$850    |
| Kidz2Leaders  | \$1,100  |
| Lekotek of Georgia  | \$500    |
| Loving Arms Cancer Outreach                               | \$515    |
| Marietta Arts Council                                     | \$4,576  |
| Marietta Cobb Museum of Art                               | \$350    |
| Marietta Mentoring for Leadership                         | \$2,795  |
| Marietta Police Athletic League                           | \$1,000  |
| Marietta Schools Foundation/Marietta City Schools         | \$3,103  |
| Marietta Theatre Company                                  | \$3,718  |
| Mostly Mutts Animal Rescue & Adoption                     | \$1,054  |
| Our Giving Garden   | \$350    |
| Paint Love  | \$500    |
| Revved up Kids  | \$2,880  |
| Serenade Heights  | \$20,282 |
| Simple Needs GA   | \$2,206  |
| Special Needs Cobb  | \$1,677  |
| Sweetwater Mission  | \$500    |
| Waymark   | \$1,000  |

## Connecting Donors to Community Needs: Nonprofits in Nature

CCF staff, fundholders, friends, and community champions took a fall field trip to visit Chattahoochee Nature Center, a new agency fundholder. While enjoying the flowers, changing leaves, waterside trails, and feathered friends, participants learned how to get involved with fellow CCF Agency Fund partners, Atlanta Angels and Blue Thanksgiving, Inc.

Chattahoochee Nature Center shared about their capital campaign for physical improvements, which was the impetus for creating an Agency Fund at CCF.



## La Parrilla Mexican Restaurants: Giving Back Through Scholarships

When La Parrilla was looking for a way to give back to the community, it didn't take long for them to think scholarships. Their business has relied heavily on manpower provided by young people attending school and they liked the idea of supporting the next generation's education by removing some of the financial burden. Using CCF's turnkey program, they quickly created two scholarships: one for Marietta High School graduates, and one for La Parrilla employees. In 2023, they awarded \$10,000 in scholarships, and they look forward to renewing these and funding additional scholarships in the future.



La Parrilla Marietta High School Scholarship Winner  
**Emily Saavedra**



La Parrilla Employee Scholarship Winner  
**Michael McHugh**

### New Scholarship Funds in 2023

- La Parrilla Mexican Restaurant Employee Scholarship Fund
- La Parrilla Mexican Restaurant Marietta City Schools Scholarship Fund
- Olivia Kate Pugh Strength and Shield Scholarship Fund

### 2023 Scholarship Impact

**14**  
Scholarship Funds

**\$186,250**  
in Scholarships

**53**  
Students

**29**  
Higher Ed Institutions

**10**  
States

# 2023 CORPORATE COMMUNITY CHAMPIONS



We are proud to recognize our Corporate Community Champions, who believe that good corporate citizenship involves supporting charitable endeavors that are impacting the community. Funding provided by Corporate Community Champions is a major source for Cobb Community Foundation's grants to organizations, empowering them to make an impact in key areas of need in the county.

## DIAMOND



## PLATINUM



## GOLD



## SILVER



## BRONZE

Atlanta Country Club • Cumberland Diamond Exchange • Mauldin & Jenkins, LLC  
Mopdog Creative + Strategy • Paraklete Financial • Smith + Howard • Synovus

## PARTNER

dK Gallery • Fortress Builders • La Parrilla Mexican Restaurant • Marietta Country Club • McWhirter Realty Partners  
OUTFRONT Media • SouthState Bank • Sute CPAs • Summit Legacy

Since 2020, Community Champions have given more than \$600,000 to community initiatives and nonprofits.

# SA White Oil Sets the New Pace for Corporate Community Champion Giving



## SA WHITE OIL COMPANY, INC.

Kim Gresh, outgoing CCF Board Chair and President of SA White Oil and Mobilized Fuels, has issued a new challenge to the Cobb business community: **invest more in Cobb by increasing your charitable giving.**

Long-known for her generosity in the Cobb community, she has been a consistent supporter of CCF's Corporate Community Champion giving program. At the end of 2023, she saw an opportunity to create a new "Elite" giving level at \$75,000. In January 2024, SA White Oil and sister company Mobilized Fuels became the first Elite-level donor.

For the previous five years, the highest giving level has been \$50,000. With the additional level, she hopes to support the upward trajectory of the Corporate Community Champions program and encourage other businesses to give more.

“

*Collaborating through the Corporate Community Champion program is an investment in the community where our customers and employees live and work,” shared Gresh. “This community has been good to us, and it is important to be a good corporate citizen in return. ”*

SA White and Mobilized Fuels are also members of CCF's Corporate Champion Roundtable, which is open to all Champions who give at the \$10,000 annual level or above. Roundtable members meet semi-annually to discuss community issues and to pose collaborative solutions.

A portion of every Corporate Champion's contribution helps to fund these and other programs that are making a positive difference in and around Cobb County.



Call (770) 859-2366 or email [CCFTeam@cobbfoundation.org](mailto:CCFTeam@cobbfoundation.org) to learn more about becoming a Corporate Champion.



## Corporate Champion Roundtable Selects Childcare and Early Learning as Area of Focus

Launched in 2021, CCF's Corporate Champion Roundtable brings together an elite group of business leaders committed to making a difference in their community. These are strategic gatherings where decision-makers from top-tier Cobb corporations analyze community needs, identify areas lacking sufficient support, and direct resources to powerfully impact areas of need in Cobb.

Throughout 2022 and 2023 these leaders undertook a needs mapping process, assessing how corporate charitable contributions were bolstering various sectors. Their analysis identified childcare and early learning, transportation, and legal services as the domains most in need of additional aid.

Recognizing the profound impact early childhood development has on the long-term well-being of a community, the group selected this topic as their area of focus.



To support the Roundtable team, CCF visited childcare facilities, interviewed childcare providers, and investigated some newly developed programs to fully grasp the local landscape. Roundtable participants will continue this work in 2024, looking for ways to make the greatest impact with charitable dollars and other untapped resources in the early childhood and childcare domains.

### Roundtable Participants

- Atlanta Braves
- Bennett Thrasher
- Brasfield & Gorrie
- Children's Healthcare of Atlanta
- Crane Elder Law Firm
- Ed Voyles Automotive
- Gas South
- Genuine Parts Company
- Georgia Power
- Indian Hills Country Club
- Liberty Furniture
- The Manely Firm
- Marietta Daily Journal
- MetroAtlanta Ambulance Service
- Moore Colson
- Northside Hospital
- Pinkerton & Laws
- Pinnacle Financial
- S.A. White Oil Company, Inc.
- SignatureFD
- United Way of Greater Atlanta
- Walton Communities
- Wellstar Health System

## Childcare and Early Learning: Crisis-Level in Cobb

The childcare crisis in Cobb County mirrors a national trend that's reaching a critical point as federal pandemic recovery funds dry up. Without these subsidies, the cost of childcare is set to soar, leaving parents, especially mothers, facing the difficult choice between work and childcare. This looming predicament is a clear workforce problem, as many may be forced to reduce work hours or leave their jobs altogether.

For many children, childcare is the best opportunity for the quality early learning experiences that prepare them for academic success and foster the crucial skills that lay the foundation for a healthy economic life cycle. Conversely, a lack of kindergarten preparedness often creates a domino effect that increases the likelihood of poverty or even incarceration.

As childcare becomes less accessible, the potential for creating these foundational experiences dwindles, threatening to perpetuate the cycle of limited educational and economic opportunities. CCF and many of its partners are taking steps to increase that accessibility.



“  
*In all four regions of the United States, the annual price of childcare exceeds the annual cost of in-state tuition at a public four-year university.*”

- Child Care Aware of America

### Corporate Champions Provide Grant For Kindergarten Readiness Program



CCF leveraged Corporate Champion donations to fund a grant to the YMCA Little School at The Church of Green Acres. The Y's Little School helps children who have never experienced a classroom situation prepare for kindergarten. This is just one example of how CCF is working to create early learning opportunities where they are needed most.

“  
*Thank you CCF for investing in the education of our children in Cobb County. This program helps our 4- & 5-year-olds be successful in Kindergarten. What a gift!*”

- Shadae Shamapande, Little Y School Youth Development Director

# EMPOWERING NONPROFITS



Through strategic grantmaking, we help nonprofits build capacity and create positive change in Cobb.



## Circles Cobb Launches First Cohort

Seeing a need for a program for families who are financially stable yet still trapped in the cycle of generational poverty, CCF was instrumental in bringing the nationally renown Circles USA program to our community in 2022. In August 2023, Circles Cobb launched its first cohort of individuals and families moving from poverty to financial stability with weekly meetings each Tuesday evening at Living Stone Church in Marietta.

Data from Circles USA's 80+ chapters shows families who stick with the program for 18 months achieve a 76 percent increase in earned income, which continues to increase after the 18-month period.

## CCF Pilots Counseling Support Fund

Access to quality mental health care should not be a function of income, resources, or residence. That is the philosophy of Cumberland Counseling, and CCF agrees. Consistent with our community resource center model, Cumberland Counseling partners with local faith and other organizations to make counseling available on site in the communities where it is most needed and typically least accessible. They charge on a sliding scale, making their services affordable to all. The extent to which they can do so, however, is a function of funding.

Cobb Community Foundation's Counseling Support Fund not only supports Richmond University's Mableton Hope Center, located in Mableton First Christian Church, it also subsidizes counseling services provided by Cumberland Counseling in those areas of Cobb where funding is not yet available.

Like so many other initiatives, this was made possible by our Corporate Community Champions and other donors who are helping to fulfill our vision of a thriving community of engaged, charitable citizens where ALL people can access opportunities and achieve their greatest potential.



## Five Nonprofits Strengthen Management Skills Through *Certified Nonprofit Professional Grants*

In corporate settings, employees are regularly offered training opportunities to develop and strengthen the skills, abilities, and processes their organizations need to thrive in a fast-changing world. Often, this type of training isn't readily available for nonprofits.

CCF worked with Cobb Collaborative, United Way of Greater Atlanta, and Kennesaw State University to develop and fund grants for nonprofit leaders to deepen their skills by earning their Certified Nonprofit Professionals (CNP) credential. The CNP is the only nationally recognized nonprofit credential that combines learning with real world experience.

The grants provide support for employees to complete an intensive program at KSU as well as a \$10,000 unrestricted cash grant for the nonprofit when the coursework is completed.

### 2023 Grantees

Five grantees each received \$1,700 to become *Certified Nonprofit Professionals*. Their organizations will receive an additional \$10,000 unrestricted grant when the coursework is completed.

Lyrika Holmes  
**Artz for the Harp Corporation**

Amber Jones  
**Serenade Heights**

Laurie Ann Wong  
**Reflections of Trinity**

Stephanie Pintacuda  
**Cobb County Public Safety Foundation**

Jillian Dillard  
**Freedom Youth Yoga**



“It was like a think tank because so many great ideas were happening with our vast diversity of experiences, missions, and perspectives.”

– **Amber Jones**  
Serenade Heights, Inc



“There is no question in my mind that we will emerge from the Certified Nonprofit Professional training as better-equipped and qualified leaders, ready to take our nonprofits to the next level.”

– **Laurie Ann Wong**  
Reflections of Trinity, Inc.

# Invest in Your Organization's Future

## CREATE AN AGENCY FUND

Agency Funds can help nonprofits ensure the future of their cause for years to come. Each organization chooses how to allocate these funds to best fit their needs, and they benefit from the earnings and interest gained. An Agency Fund creates an additional avenue for receipt of donations, and more importantly, frees them to focus time and energy on their mission.

### AGENCY FUND BENEFITS

- Professional Investment Management
- Increased Organizational Visibility
- Cost-Efficient Administration
- Acceptance of a Variety of Assets
- Planned Giving Services

### AGENCY FUNDS AT CCF

Funds created in 2023 are in **bold**.

- 10 Women of Hope Fund
- 2nd Century Invictus Fund
- Acworth Performing Arts Complex Fund
- Acworth Special Needs Development Fund
- Adult Disability Medical Healthcare Fund
- Advocates for Children Endowment Fund
- Aloha to Aging Fund
- **Atlanta Angels Fund**
- Aviation Museum of Cobb Fund
- **Blue Thanksgiving, Inc Fund**
- Bullock Hope House Fund
- **Chattahoochee Nature Center Endowment Fund**
- Chin Up Fund
- Christina Diaz Memorial Scholarship Fund
- **Circles Cobb Fund**
- **Cobb Bar Association Children's Emergency Fund**
- **Cobb Collaborative, Inc. Fund**
- **Cobb County Cemetery Preservation Fund**
- Cobb County Public Safety Foundation Fund
- Cobb Sheriff's Foundation, Inc. Fund
- Cole Family Root House Endowment
- Destiny's Daughters of Promise Fund
- **Devereux Georgia Fund**
- Earl and Rachel Smith Strand Theatre Fund
- Extension Foundation Fund
- **Family Promise of Cobb County Fund**
- Food Security for America Fund
- Four Corners Group Fund
- Friends for the East Cobb Park Endowment
- Friends for the East Cobb Park Fund
- Georgia Symphony Orchestra Fund
- Gerald Marvel Endowment Fund
- **Good Mews Kitty Care Fund**
- Goshen Valley Fund
- **GRACEPOINT School Fund**
- **Highland Rivers Foundation, Inc. Fund**
- Humane Society of Cobb County - General Fund
- Humane Society of Cobb County - Legacy Endowment
- Jeri Barr Legacy Endowment Fund
- Keeler Root House Fund
- **Kidz2Leaders, Inc. Fund**
- Leadership Cobb Alumni Association Fund
- LiveSafe Resources Endowment
- Loving Arms Fund
- Marietta Arts Council Fund
- Marietta Garden Center Fund
- Marietta Kiwanis Foundation Scholarship Fund
- Marietta/Cobb Museum of Art Endowment
- Meals by Grace Feeding Hungry Children in North Georgia Fund
- Mostly Mutts Fund
- MUST Ministries Agency Fund
- Nana Grants Fund
- Noonday Association of Churches Fund
- One Cumberland Fund
- Power Family Cabin Fund
- Reflections of Trinity Growth Fund
- **SAE School Fund**
- **SafePath Children's Advocacy Center Fund**
- **Saving Susan Ministries Fund**
- ServeComm Fund
- Simple Needs GA Fund
- Smith-Gilbert Gardens Foundation Capital Fund
- Southern Center for International Studies Fund
- Special Needs Cobb Fund
- Stensland Family Fund for the Georgia Symphony Orchestra
- Sweetwater Mission Fund
- Teach One 2 Lead One Fund
- Tillman House Resource Center Fund
- Tommy Nobis Legacy Scholarship Fund
- Waymark Foster Fund

**Cobb Community Foundation is home to**

**59** Agency Funds

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**11** Agency Endowments

# Kidz2Leaders Agency Fund Empowers Kids Facing Parental Incarceration



Kidz2Leaders recently created an Agency Fund at CCF to help ensure that every child affected by parental incarceration has the support they need to break the cycle of crime and build a brighter future. This partnership not only strengthens Kidz2Leaders' financial foundation but also expands their capacity to serve more children in Cobb and throughout Georgia.

In the shadow of Georgia's prisons, nearly 200,000 children bear the heavy burden of having an incarcerated parent. In addition to the trauma and stigma associated with parental incarceration, research shows that children of inmates are three times more likely to become involved in the criminal justice system. Kidz2Leaders confronts this adversity by offering stability, opportunity, and community.

By aligning with CCF, Kidz2Leaders can access professional investment management overseen by CCF's Investment Committee and grow their assets more cost effectively. This translates directly into more resources for these children. They are also creating more opportunities for access to our network of prospective donors and partners.

Since 1999, their programs have impacted more than 1,500 campers and family members. Young adults who complete their programs go on to lead independent lives, avoid incarceration, and contribute back to their communities through leadership and volunteerism.

This new fund with CCF is more than a financial maneuver; it's an investment in human potential, ensuring that the transformative work of Kidz2Leaders will reach as many children in need as possible.



“  
*Our fund at CCF allows us to focus on serving children, knowing this asset is professionally managed. We truly value our partnership with the team at the Cobb Community Foundation!*  
”

**- Christina Cummings,  
Executive Director, Kidz2Leaders**

# AMPLIFY YOUR IMPACT



By partnering with Cobb Community Foundation, your charitable dollars have more impact. Our unique structure helps you gain tax advantages while giving more to the causes you care about. With CCF managing the paperwork, it's a more convenient way to keep track of your giving. And you contribute a small percentage to furthering CCF's community leadership work rather than paying traditional administrative fees.

## DONOR ADVISED FUNDS

A Donor Advised Fund is like a charitable investment account to support charitable organizations you care about. When you contribute cash, securities, or other assets to a Donor Advised Fund, you are generally eligible to take an immediate tax deduction for the fair market value of your gift. Funds are invested for tax-free growth, and you can recommend grants to virtually any IRS-qualified public charity.

Individuals and families often establish these "Giving Funds" to teach younger generations about giving.

### NEW Donor Advised Funds

- Robert & Jane Taylor Charitable Fund
- Cumberland Diamond Exchange Community Legacy Fund
- Ray & Sharon Thomas Donor Advised Fund
- Cardinal Legacy Fund
- Kellum Family Fund

## COMMUNITY GRANTMAKING FUNDS

When you give to one of CCF's community grantmaking funds (like the Cobb Community Fund) your donation is pooled with those of other donors to address pressing community needs. These funds are unrestricted in their power to help our community thrive.

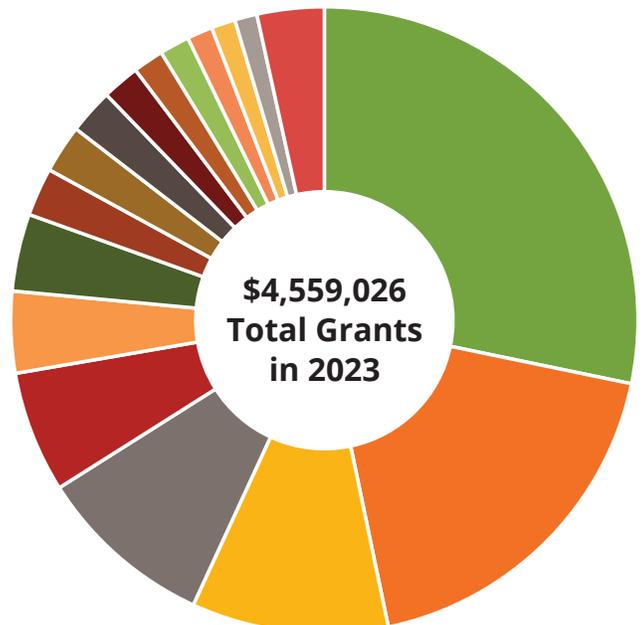
## DESIGNATED FUNDS

By establishing a Designated Fund, you select one nonprofit organization to receive the funds. And by opting to endow your donations, you provide a permanent source of support for your preferred nonprofit, which achieves long-term sustainability.

## FIELD OF INTEREST FUNDS

By choosing a Field of Interest Fund, you are able to provide grants to advance your unique interests that are important to you such as arts & culture, children & family, health & human services, environment, etc.

- 28% - Education
- 18% - Faith Based
- 10% - Youth Services & Development
- 9% - Community Improvement
- 6% - Homelessness and Poverty
- 4% - Human Services
- 4% - Food Insecurity & Nutrition
- 3% - Medical Research
- 3% - Arts, Culture & Humanities
- 2% - Recreation & Sports
- 2% - Financial Assistance
- 2% - Philanthropy and Volunteerism
- 2% - Substance Abuse
- 1% - Animal-Related
- 1% - Crisis Intervention & Mental Health
- 1% - Family Services
- 4% - All Others:
  - International Human Rights
  - Healthcare
  - Physical or Mental Disability
  - Military & Veterans Support, Leadership Development
  - Public Safety, Disaster Preparedness & Relief
  - Environment & Beautification
  - Housing & Shelter
  - Patient Support & Fundraising for Medical Causes
  - Law Enforcement, Crime Prevention & Legal Services
  - LGBTQ support
  - Sexual Exploitation
  - Adoption and Foster Care
  - Senior Services
  - Medically Fragile Children
  - Social Sciences, Science & Technology



**\$3,254,120 (71%) went to organizations in Metro Atlanta, and \$2,270,682 (50%) went specifically to organizations in Cobb.**

# Rooted in Community: Sachs Invest in Cobb Through Donor Advised Fund

Dr. Philip Sachs has roots in Cobb County that go back five generations, and his wife Judy moved here from North Carolina in 1972. Even though work and retirement plans have taken them elsewhere, they still maintain a residence in Marietta and have a deep desire to give back to the community they call home.

"I liked the idea of giving back to the Cobb community. This place has meant so much to us," said Philip. "We're friends with Estate and Tax Attorney (Mayor) Steve Tumlin, and he suggested we get in touch with Cobb Community Foundation."

The Sachs family was so impressed with the team that they decided to open a Donor Advised Fund. "They gave us ideas, but ultimately what we do and don't fund is up to us. That's what I like about having a Donor Advised Fund at CCF." The Sachs family has used their DAF to support a variety of important endeavors, from scholarships to animal welfare to food insecurity. "We like the flexibility of a Donor Advised Fund, and of course, the tax advantage is great."

Another tax strategy the Sachs family has leveraged is the IRA Qualified Charitable Distribution (QCD). While Donor Advised Funds are not eligible to receive QCDs, many other types of community foundation funds are. "I wrote a check directly out of my IRA to the foundation so it would not pass through me. If I had simply withdrawn the amount and then written a personal check, in my situation, the IRS would not allow a current deduction for the full amount."



Best-Kept  
Giving Secret:

**IRA Qualified  
Charitable  
Distributions**



Through an IRA Qualified Charitable Distribution (QCD), donors ages 70.5+ can transfer up to \$105,000 to charity tax-free each year. For those at least 73 years old, QCDs count toward the required minimum distribution (RMD) for the year.

Normally, IRA distributions are taxable. With a QCD, these distributions become tax-free when they're paid directly from the IRA to an eligible charitable organization like CCF.

IRA Qualified Charitable Distributions may be made to community grantmaking funds, designated funds, scholarship funds, and field of interest funds. Donor Advised Funds do not qualify.

**Contact us at (770) 859-2366 or [CCFTeam@cobbfoundation.org](mailto:CCFTeam@cobbfoundation.org) to learn more.**

# Steve Imler: Community Service Meets Financial Stewardship



Steve Imler retired more than two decades ago after co-founding a CPA/consulting firm that later became part of a Fortune 500 company. After getting involved with the Humane Society of Cobb County and Friends of the Strand Theatre in early retirement, Steve learned about Cobb Community Foundation (CCF) and has served as a board member since 2012.

With his background in accounting, he has helped the organization make great strides in streamlining and strengthening financial reporting. "I'm proud of the evolution and improvement we've had in business operations, and I'm glad I could contribute in that way."

Another way Steve has contributed to the community is through a Donor Advised Fund (DAF) with CCF. His DAF allows him to simplify his giving as well as take advantage of certain tax planning techniques, such as bunching the tax benefits of multiple years of contributions into one while still spreading out his distributions as he sees fit.

Steve has also incorporated his DAF into his estate plan so that it will continue to benefit the community while still minimizing taxes. He's worked closely with his attorney to direct his IRA to charities, including CCF as holder of his DAF, which won't pay the income taxes individual beneficiaries ultimately would. Instead, he is taking care of the people dear to him with assets that won't increase their income tax liability.

“  
*This approach minimizes taxes while also giving me maximum flexibility to adjust planned gifts to charities without having to change my will to keep it up to date. I've named successor advisors to my Donor Advised Fund, and when my successors are no longer around or available, Cobb Community Foundation will step in as the advisor of last resort to make decisions for any remaining assets to best serve the needs of the community.*”

- Steve Imler

# Join the CCF Legacy Society

## Activate Good in Cobb for generations through an endowment fund or estate gift

The Legacy Society is a distinguished group of donors who have designated a “forever gift” to CCF in their will or estate plan or have created or made a significant contribution to an endowed charitable fund at CCF during their lifetime.

Planning an estate gift allows you to strategically accomplish both financial and charitable objectives. For many people, this includes honoring loved ones, providing for heirs, minimizing tax burdens, supporting this community they call home, and preserving the family name.

### HOW WE HELP

#### CCF simplifies the giving process.

Establishing a fund at CCF as part of your estate allows you to:

- Support your favorite nonprofits or choose community grantmaking funds that align with your interests
- Manage future gifts to multiple entities, which you can change at any time cost-free
- Give almost any kind of asset, from real estate and stock, to retirement plans and life insurance proceeds
- Avoid setup costs and ongoing management of a private foundation

To become a member of the Legacy Society, establish or make a meaningful contribution to an endowed fund during your lifetime or include Cobb Community Foundation in your will or other deferred gift plan. Together we will develop instructions for your gift, and then upon your death, we will use your gifts according to your wishes. We will also handle all administrative tasks along the way, so neither you nor your heirs are burdened by them.

### WHAT YOU CAN GIVE

We can accept many kinds of assets, helping you maximize your giving and find tax advantages.



Cash



Business Interests



Appreciated stock or securities



Retirement Funds



Real estate and other tangible property



Life Insurance / Annuities

Call (770) 859-2366 or email [CCFTeam@cobbfoundation.org](mailto:CCFTeam@cobbfoundation.org) to learn more.

# AWARDS



## Jay Cunningham 2023 JAMES L. RHODEN VISIONARY PHILANTHROPIST OF THE YEAR

Cobb Community Foundation is proud to honor Superior Plumbing's Jay Cunningham with the 2023 James L. Rhoden, Jr. Award for Visionary Philanthropy. As the father of seven children and a grandfather, family is in the forefront of everything he does.

Jay's dedication to advancing with purpose, challenging conventional thinking, and uplifting those facing obstacles around him is truly praiseworthy. Here are just a few examples of ways he invests in Cobb County:

- The Children's Healthcare of Atlanta, Cunningham Family building in Kennesaw
- The Superior Plumbing VECTR Center, an academic transition support center for veteran students and their dependents
- Superior Pets, an initiative pairing sheltered animals with deserving veterans

He actively urges local businesses to contribute both financially and physically to their communities. His inclination to participate in discussions that test the boundaries of established thought often leads to rewarding results for many within our community.

### AWARD RECIPIENTS

- 2022 - Shelley Elder
- 2021 - Skip Harper
- 2020 - Howard Koepka
- 2019 - Bob Kiser
- 2018 - David and Brittney Bottoms
- 2017 - Governor Roy Barnes
- 2016 - Valerie Voyles
- 2015 - Ron Francis
- 2013 - Doug Hertz
- 2012 - Bob Prillaman
- 2011 - Doug Chaffins
- 2010 - Fred Bentley, Sr.
- 2009 - Sam Olens
- 2008 - Jerry Nix
- 2007 - Earl Smith
- 2006 - Larry Freeman



### ABOUT THE AWARD

In conjunction with CCF's 10th anniversary in 2003, our board of directors created the "Visionary Philanthropist" award in the name of CCF Founder Jim Rhoden. The award is voted on annually by CCF board members to recognize and honor a Cobb business and community leader making significant contributions to our community through their gifts of time, talent, and treasure.

# First Christian Church of Mableton

## 2023 HOWARD KOEPKA COLLABORATIVE SPIRIT AWARD



We are thrilled to honor First Christian Church of Mableton (FCCM) with the prestigious Howard Koepka Collaborative Spirit Award. Executive Minister Barry Smith accepted the award on the church's behalf, along with a \$10,000 unrestricted grant.

This accolade is a testament to FCCM's commitment to community service and civic engagement. Nominated by the Lions Club of Cobb County, FCCM has been recognized as a pivotal force in South Cobb, leading various initiatives and actively partnering with numerous organizations. Barry Krebs, Lions Club Cobb Zone Chairman, commended FCCM for their extensive involvement: "The First Christian Church of Mableton is deeply integrated into our community fabric, supporting vital programs and opening their doors to numerous civic organizations."

FCCM's contributions have significantly impacted the local community, from aiding in school and holiday events to participating in Keep Cobb Beautiful litter cleanups. The church's support extends to crucial service providers such as MUST Ministries, MIC, HOPE, Lions, and Sweetwater Mission, further solidifying its role as a cornerstone of compassion and cooperation in the community.

### ABOUT THE AWARD

The Howard Koepka Collaborative Spirit Award honors a nonprofit annually that embodies the life spirit of the late Howard Koepka, a much-loved community organizer known for asking everyone everywhere, "How can we help you?" In his role at Noonday Association of Churches, Koepka was an integral part of the Cobb Community Food Fleet, an initiative of Cobb Community Foundation and Noonday Association in collaboration with 90 nonprofit, for profit, faith-based and government organizations that distributed over 4 million pounds of food during the pandemic.

### AWARD RECIPIENTS

2022 - Sweetwater Mission



# Professional Advisors Network (PAN)

We believe that charitable giving done well can create a lasting impact. We created our **Professional Advisors Network** to bring together professionals who help their clients with their charitable giving to share ideas and best practices and to meet fellow advisors who share their passion for community.

## CCF Services for Advisors

Whether you're an attorney, financial planner, or tax advisor, CCF can assist you and your clients in structuring tax-wise gifts that establish an enduring community legacy:

- Develop strategic giving plans for your clients and their families, including giving instruments and funding options
- Assist with grantmaking research, recommendations, and outcomes
- Provide guidance on the community's charitable needs
- Illustrate, project, and consult on or review necessary documents

## PAN Connects

Networking events for our Professional Advisor Network (PAN) members allow us to connect in small groups to grow referral networks and to expand attendees' knowledge of charitable giving, legacy building and opportunities for community impact.

## PAN Tours

Bus tours and visits to Cobb nonprofits give PAN members insight into community challenges and opportunities so they can advise clients on where charitable gifts can make the greatest impact.

**Richard Bennett** | Bennett Thrasher  
*Wealth Manager*

**Michael Bohling** | HLB Gross Collins  
*CPA*

**Gary Bottoms** | Summit Legacy  
*Insurance Advisor*

**Tripp Boyer** | Boyer Ramey Wealth  
Mgmt Group | *Financial Planner*

**Donna Briggs** | Coker James &  
Company | *Managing Principal*

**Elizabeth Burdette** | SignatureFD  
*Attorney*

**Michael Covington** | Truist Wealth  
*Wealth Manager*

**Alan Cox** | Ronald Blue Trust  
*Wealth Manager*

**Mike DeWitt** | Brightworth  
*Wealth Manager*

**Bridget Dunk** | Bennett Thrasher  
*CPA*

**Shelley Elder** | Crane Elder Law Firm  
*Attorney*

**Kristi Epp** | Frazier & Deeter | *CPA*

**Hunter Ewing** | High Ground  
Company | *Insurance Advisor*

**David Fisher** | SignatureFD  
*Wealth Manager*

**Megan Richards Flores** | Gregory  
Doyle Calhoun & Rogers | *Attorney*

**Bryan Galat** | Galat Law Group  
*Attorney*

**Nancy Gault** | Nichols, Cauley  
& Associates, LLC | *CPA*

**Melissa Gilbert** | Gregory Doyle  
Calhoun & Rogers | *Attorney*

**Susan Godbee** | Pinnacle Financial  
Partners | *Private Wealth Advisor/SVP*

**Chris Gruehn** | Pinnacle Financial  
Partners | *Wealth Manager*

**Tammy Guelfo** | HLB Gross Collins  
*CPA*

**Todd Hall** | Mariner Wealth Advisors  
*Financial Planner*

**Stacy Haubenschild** | Henssler  
Financial | *Wealth Manager*

**Walt Helms** | Nease, Lagana, Eden,  
& Culley | *Insurance Advisor*

**Bob Heuel** | Mauldin & Jenkins  
*CPA*

**Wade Hill** | SignatureFD | *Financial  
Planner*

**Joe James** | Coker James &  
Company | *CPA*

**Jeff Jones** | Owenby Jones Wealth  
Mgmt | *Financial Planner*

**Curtis Kimball** | Williamette Mgmt  
Associates | *Wealth Manager*

**Daniel Lee** | Dan Lee & Associates  
*CPA*

**Todd McMullen** | Moore Colson  
*CPA*

**Terri Munro** | Waverly Advisors  
*Financial Planner*

**Steven Murphy** | Moore Colson  
*CPA*

**Ican Osinjolu** | Raymond James  
*Financial Planner*

**Casey Patrick** | finoBlue Planning  
Group | *Financial Planner*

**Robert Petmecky** | Petmecky Law  
Group | *Attorney*

**Christine Phelps** | Sage Mountain  
Advisors | *Wealth Manager*

**Casey Smith** | Wiser Wealth Mgmt  
*Wealth Manager*

**Michael Sute** | Sute CPAs | *CPA*

**Susan Tillery** | Paraklete Financial  
*Financial Planner*

**Tony Turner** | Cohen Pollock Merlin  
Turner | *Attorney*

**Russell Wood** | PieFarmer  
Enterprises | *Financial Planner*

**Rhett Zeigler** | Magnolia Trust  
Company | *Trust Officer*

## Professional Advisor Network Member Profile



### Melissa Gilbert

Member, Gregory, Doyle, Calhoun & Rogers LLC's Trust & Estate & Tax Group

Melissa W. Gilbert, member of GDCR's Trust & Estate & Tax section, attended Georgia State University College of Law and Florida State University.

After working in probate and fiduciary litigation early in her career, Gilbert transitioned to planning and administration. Her goal was to help clients avoid the many financial pitfalls, family dynamic issues, and other consequences resulting from inadequate preparation.

“  
*I enjoy helping people work through sometimes difficult, but important planning issues. After working in litigation on the other side of estate planning, I am confident of the value being provided through our practice. Earning my clients' trust is my highest goal.*”

- Melissa W. Gilbert

She joined the CCF Professional Advisor Network in 2022 for opportunities to network with other professional advisors. An invested community member and longtime volunteer, Gilbert was attracted to the positive impact that Cobb Community Foundation has had since its inception. She also liked the benefit of having a partner that provides opportunities for charitable giving with a greater local impact than a national broker. When her own family received proceeds from the estate of her late parents, they determined that a charitable giving fund through CCF would be the best way to honor their community-minded legacy.

Gilbert carries out her client's specific wishes to the letter and makes everything as easy as possible to execute. Avoiding family strife and reducing tax burdens are at the top of the list of her services. But when clients seek advice on charitable giving, she has taken the opportunity to educate them on the important benefits of charitable giving through CCF.

Professional advisors like Melissa play a crucial role in educating their clients about tax-efficient charitable giving. At Cobb Community Foundation, we understand the importance of tax planning and the desire to create a positive change in your community. Together, we can create a legacy that will continue to make a difference for generations to come.

# How will you **Activate Good?**

Let's partner to spark positive change in and around Cobb.



- ❑ **Join the Legacy Society** by designating a gift to CCF in your estate plan, or creating (or donating to) an endowed fund at CCF
- ❑ **Explore a Qualified Charitable Contribution** from your IRA to make your charitable dollars go farther
- ❑ **Join the Catalyst Society** through a gift to the Catalyst Fund, supporting CCF's community leadership and program efforts
- ❑ **Donate to the Cobb Community Fund** to support critical community needs through the power of collective giving
- ❑ **Open a Donor Advised Fund** at CCF to make tax-advantaged gifts to the causes you care about
- ❑ **Become a Corporate Community Champion** and know that your giving is going where it's needed most
- ❑ **Start a Scholarship Fund** to invest in the next generation
- ❑ **Start a Field of Interest Fund** for you and others to support a specific cause that is near and dear
- ❑ **Tell Your Professional Advisor** about CCF and why we are your choice for your charitable fund
- ❑ **Encourage Your Friends** to partner with CCF to make the most out of their charitable giving
- ❑ **Spread the Word** to nonprofits doing great work in Cobb to make sure we know who they are

Call (770) 859-2366 or email [CCFTeam@cobbfoundation.org](mailto:CCFTeam@cobbfoundation.org) to get started.



1100 Circle 75 Parkway  
Suite 1000  
Atlanta, GA 30339

## THANK YOU, CORPORATE COMMUNITY CHAMPIONS

### DIAMOND



### PLATINUM



### GOLD



### SILVER



### BRONZE

Atlanta Country Club • Cumberland Diamond Exchange • Mauldin & Jenkins, LLC  
Mopdog Creative + Strategy • Paraklete Financial • Smith + Howard • Synovus

### PARTNER

dK Gallery • Fortress Builders • La Parrilla Mexican Restaurant • Marietta Country Club • McWhirter Realty Partners  
OUTFRONT Media • SouthState Bank • Sute CPAs • Summit Legacy