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Report to the Community



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The Community Foundation of West Georgia is transforming our region—**empowering a thriving community where there is abundant opportunity and great quality of life for all.**

For more than two decades, the Community Foundation of West Georgia has inspired philanthropy to respond to critical community needs and build thriving communities across Carroll, Haralson, and Heard counties.

We serve as a critical link between caring donors, committed nonprofits, and local communities, keeping our finger on the pulse of the issues and organizations that make a difference in our region. We deeply understand the challenges at hand and the nonprofits working to solve them.

As a tax-exempt public charity, we carefully steward the charitable resources of our community and have been awarded a Candid Silver Seal of Transparency.



LETTER FROM OUR CHAIR

As a passionate advocate for philanthropy, I am honored to serve on the Board of Directors for the Community Foundation of West Georgia (CFWG). My journey with CFWG began in 2022, driven by a deep commitment to our community and a desire to make a lasting impact. As someone who has been actively involved in various local organizations, I have witnessed firsthand the incredible work being done to improve the lives of our residents. My background in accounting has given me a particular interest in financial endeavors, and I am dedicated to using my skills to support CFWG's mission.

For the past 20 years, the Community Foundation of West Georgia has been a cornerstone of our community. We have connected generous donors with critical needs, providing immediate support to local nonprofit organizations. This has allowed us to swiftly address concerns and make a tangible difference in the lives of many. However, we recognize that true and lasting change requires more than a transactional mindset. What happens when we think more strategically about the needs in our communities? What if we shift our focus from merely addressing immediate needs to transforming the underlying conditions that create them in the first place?

Today, our foundation leads the way in fostering community growth and improvement, transitioning from a model of transactional philanthropy to one of transformational change. This evolution is evident in the numerous initiatives we spearhead. From innovative platforms like The Connector, which links individuals in need to local resources, to OnBoard, a training program that equips nonprofit board members with the skills they need to govern effectively, we are dedicated to making West Georgia a better place for everyone. Our On the Table initiative brings community members together to discuss pressing issues and collaborate on solutions, fostering a sense of unity and shared purpose. All of these important initiatives have one goal in mind; to create lasting, positive change.

Our success would not be possible without the invaluable partnerships we've forged with local philanthropic businesses, professional advisors, donors, fundholders and nonprofit organizations. These collaborations are vital to our mission, amplifying our efforts and extending our reach. Together, we are not just investing in the present but also securing a prosperous future for generations to come.

We invite you to partner with us to transform West Georgia. Your continued support and belief in our vision are crucial. Let's join forces and make a lasting impact together!



Nichole Pezold | Board Chair

Board Members

Pat Carden	Tim Grizzard	Steve McLendon (<i>Secretary</i>)	Monica Smith
Lynn T. Clarke	Caitlin Harris	Karen Middlebrooks	Mitch Springer
Melina Douthit	Adam Hinman	Nichole Pezold (<i>Board Chair</i>)	P. T. Waldrep
Joe Garrett	Randy W. Jones (<i>Vice-Chair</i>)	Dave Smith (<i>Treasurer</i>)	

Contact the Community Foundation of West Georgia at **770-832-1462** or **info@cfwg.net** to learn more.





TRANSFORMATIVE GIVING: A Dual Perspective

Jason Norton, founder of Norton Financial, Inc. of Carrollton, has a donor advised fund at the Community Foundation of West Georgia. Norton said he was motivated to establish a fund because it is a very flexible and smart way to plan charitable giving.

“In the same way I believe in diversifying one’s investments, I feel philanthropy through my fund allows me to support so many worthy causes that need our assistance and attention. The Community Foundation gives me great awareness of these causes so our fund has been able to support needs we might not have been aware of otherwise,” he said.

“It is also nice to work with a local community fund where you get to know the people. The Foundation’s team does a great job communicating and problem-solving, and they spend a tremendous amount of time on due diligence, which any donor/investor should appreciate,” he added.

Norton received an economics degree at the University of West Georgia where a class on personal finance piqued his interest in that field. His firm celebrated its 20th anniversary this year with \$267 million in assets under management.

“As a first-generation college graduate, I really enjoy annual awarding of the Norton Financial Trailblazer Scholarship, which awards \$2,000 to a graduate of Central High School who also is a first-generation college student,” he said. “Our family also has enjoyed supporting West Georgia Habitat and THS Emergency Shelter via our fund at the Community Foundation.”

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QUIZ TIME:

Is a Donor Advised Fund (DAF) Right for You?

Donor Advised Funds (DAFs) are a popular and flexible way to manage charitable giving, allowing individuals to contribute to their fund, receive immediate tax benefits, and then recommend grants over time to their favorite nonprofits. At the Community Foundation of West Georgia, we offer DAFs as a powerful tool to support philanthropic goals while simplifying the giving process. **Whether you want to maximize your tax benefits, involve your family in charitable activities, or create a lasting legacy, a DAF could be the perfect solution. Take our quiz to see if a Donor Advised Fund is right for you!**

Are you looking for a flexible and efficient way to manage your charitable giving?	<input type="radio"/> Yes	<input type="radio"/> No
Do you want to maximize your tax benefits while supporting your favorite causes?	<input type="radio"/> Yes	<input type="radio"/> No
Would you like to recommend grants to multiple charities from a single fund?	<input type="radio"/> Yes	<input type="radio"/> No
Do you need help identifying areas that need more support or guidance on how to give strategically?	<input type="radio"/> Yes	<input type="radio"/> No
Is the idea of creating a lasting legacy through your charitable donations appealing to you?	<input type="radio"/> Yes	<input type="radio"/> No
Are you familiar with Qualified Charitable Distributions (QCDs) and how they can benefit your charitable giving strategy?	<input type="radio"/> Yes	<input type="radio"/> No
Do you want to use Required Minimum Distributions (RMDs) from your retirement accounts for charitable donations?	<input type="radio"/> Yes	<input type="radio"/> No

RESULTS

MOSTLY YES: A Donor Advised Fund (DAF) could be an excellent choice for you. It offers flexibility, tax advantages, and professional management, allowing you to focus on making a meaningful impact with your charitable contributions.

MOSTLY NO: A DAF might not be the best fit for your needs. Consider exploring the various charitable options offered by CFWG that may better align with your preferences and goals.



A LEGACY OF TRANSFORMATION; The Abundant Grace Memorial Fund



When Bill and Lisa Travis' granddaughter Ralyx Grace passed unexpectedly during her freshman year of high school, the family wanted to do something meaningful to honor her loving spirit and to keep her memory and legacy alive in the community.

They decided to establish a donor advised fund at the Community Foundation of West Georgia called Abundant Grace Memorial Fund. Lisa had served on two Foundation panels reviewing grant requests and so was familiar with how serious the Foundation staff is in considering grant requests with dignity and thoroughness.

Lisa said that Ralyx was always a very giving person. "Even as a two-year-old in preschool she responded to those in need around her. There was a little boy with special needs in her class, and she took that child under her wing. Later in school she would worry about any underdog who the kids might be making fun of.

"When Ralyx passed away, we wanted to keep doing what we had watched her do, such as Christmas for those in need or making sure kids were able to go on school trips. Our fund gives us the flexibility to do that and it's easy to make grants" she said.



This would have been Ralyx's senior year at Bremen High School so that will be a focus this year for the family as they work with the cheerleading team and the special education department.

Lisa said that she hopes her other grandchildren will learn from Ralyx's example to always give and to live every day to the fullest.



JOIN THE CFWG LEGACY SOCIETY

Ensure future generations enjoy the promise of an ever-improving quality of life

The Legacy Society is a distinguished group of donors who have designated in their will or estate plan that a portion of their estate be gifted to the Foundation upon their passing.

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 the community they call home, passing the farm to the next generation, and preserving the family name.

HOW WE HELP

We're here to help simplify the giving process.

Establishing a fund at the Community Foundation as part of your estate allows you to:

- Support your favorite nonprofits or choose community grant-making funds that align with your interests
- Give almost any kind of asset, from real estate to 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, include the Community Foundation in your will or other deferred gift plan. If you have CFWG in your estate plans, please contact us so we may fully understand your intentions and recognize your generosity. Upon your death, we will use your gifts according to your instructions by investing the principal and using the interest to make grants to the charities you designate, handling all administrative tasks.



DEFINITION

What is an estate?

An estate is anything/everything you own and will leave behind at your passing.

Contact the Community Foundation of West Georgia at **770-832-1462** or **info@cfwg.net** to learn more.





THE CONNECTOR: Transforming Access to Support Services

In today's fast-paced world, navigating the maze of social services can be overwhelming for those in need. Traditional methods often require individuals to search tirelessly for resources, fill out multiple applications, and wait for responses, all while dealing with the stress of their circumstances. However, a groundbreaking platform called The Connector is set to change this narrative, making access to support services simpler and more efficient than ever before.

From Concept to Reality

In our last report to the community, we introduced you to the concept of The Connector. After many months of dedicated work, extensive user testing, invaluable agency feedback, and rigorous platform building, The Connector is now LIVE.

Streamlining the Application Process

The Connector is a revolutionary platform designed to streamline the application process for individuals seeking assistance. This single application is then fed into a sophisticated system where it is matched with the appropriate agency capable of meeting the user's needs. This innovative approach eliminates the need for individuals to fill out multiple forms and reduces the time spent searching for the right support.

How The Connector Works

Once a user submits their application, the Connector goes to work. The details provided help to identify the most suitable agency to address the individual's needs. If the matched agency can fulfill the request, they proceed to provide the necessary support. In cases where the agency is unable to assist, the request is redirected to another organization within the network, ensuring that no one falls through the cracks.

This matching process is both thorough and efficient. The Connector's system takes into account various factors such as the type of assistance needed, the urgency of the request, and the availability of resources at different agencies. By doing so, it ensures that every application is directed to the most appropriate service provider. This not only speeds up the process of receiving help but also increases the likelihood of successful outcomes for individuals seeking assistance.

These numbers represent the first 3 months that the Connector was live.



\$433,426

Total amount requested



\$59,118

Total amount provided



172

Total utility requests



619

Total shelter/housing requests



660

Total applications



567

Total number of unique individuals provided support



LOOKING AHEAD

As The Connector continues to expand, its impact on the social services landscape will only grow. By fostering collaboration among agencies and streamlining the application process, The Connector is poised to set a new standard for how assistance is provided. This platform represents a significant step forward in ensuring that everyone, regardless of their circumstances, can access the help they need with dignity and ease.

“It is incredibly gratifying to see the Connector come full circle from a simple idea to a fully functional software platform that is making a real difference in the lives of residents in West Georgia.” says Kim Jones, President of the Community Foundation of West Georgia. “The success of the Connector is a testament to the

power of collaboration. The way various agencies have come together, each bringing their unique strengths and resources, has been truly inspiring and has significantly amplified our impact on the community.”

CFWG would like to invite you to join us in making a difference through the Connector! Nonprofit agencies can sign up to be part of this transformative platform, enhancing their ability to serve the community. Additionally, your generous donations to the Connector fund will help sustain and expand our efforts. Together, we can continue to support and uplift the residents of West Georgia.

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A PARTNERSHIP BORN FROM On The Table



Molding Passionate Active Creative Kids (M-PACK) provides top-tier services to children experiencing Adverse Childhood Experiences (ACEs). These programs bridge gaps caused by emotional and social neglect through engaging activities and life skills enrichment.

“I’ve always been involved with programs that were youth-centered and more specifically for youth that are considered at-risk.” said Demarcus Copeland, Founder and Director of M-PACK. **“The Boys and Girls Club closing in our community really inspired me to launch M-PACK. Our community may not be as big as other urban areas, but our kids should always be given the same opportunities offered to other communities no matter the size.”**

M-PACK benefited from CFWG’s invaluable guidance and support during its formation, laying the groundwork for successful partnerships. “When we began the paperwork to form M-PACK, the first person I reached out to was Kim Jones. She gave the best advice and has always been very helpful even in the form of email blasts!” Demarcus reminisced.

The On the Table initiative by the Community Foundation of West Georgia facilitated M-PACK’s partnership with the Carrollton Housing Authority. Following a discussion on afterschool programming, housing authority employees sought collaboration, leading to M-PACK’s move into a renovated building.

The summer camp commenced on June 9, attracting 40 children, with new participants joining weekly. “When we started the program the housing authority was where we wanted to launch,” said Demarcus. “So I was very excited and optimistic for this opportunity.”

M-PACK plans to introduce services for parents, addressing accountability, security, and positivity, particularly for single-parent families. We asked Demarcus what advice he would give to other organizations looking to form similar partnerships through community initiatives. His answer was simple; be open to new creative ways to expand your impact. The M-PACK-Carrollton Housing Authority partnership, facilitated by the Community Foundation of West Georgia, significantly impacts the community, fostering youth growth and planning for a brighter future.

WHAT IS ON THE TABLE?

On the Table is a community-wide initiative that brings people together over small group conversations to discuss ideas, challenges, and solutions for improving the community. These conversations help spark new connections and inspire action to create a stronger, more vibrant West Georgia.

UNLOCKING GROWTH: The Investment Strategy at CFWG



At the Community Foundation of West Georgia (CFWG), strategic investment is not just about financial returns; it's about maximizing impact for our community. Our investment strategy is built on principles of stewardship, sustainability, and community benefit.

We understand the importance of entrusted funds and the responsibility that comes with them. At CFWG, every investment decision is guided by rigorous due diligence and careful risk management to safeguard the assets entrusted to us. Our conservative approach ensures that we prioritize the long-term stability and growth of your investments.

Our investment committee meets in person with our financial advisors quarterly to monitor and discuss our investment portfolio. This hands-on oversight allows us to make informed decisions and adjustments as needed. We emphasize sustainable growth to support both current and future community needs, diversifying our investment portfolio across various asset classes to achieve stable returns while mitigating risk.

The growth of your fund at the Community Foundation of West Georgia not only strengthens our collective impact but also provides your family with additional tax-free resources to give back to the community. By leveraging the foundation's expert investment strategies, your contributions grow over time, allowing for more support to the causes and initiatives that matter most to you.

TRANSFORMING OUR COMMUNITY TOGETHER

At the Community Foundation of West Georgia, the administrative fees you contribute by having your funds with us are a catalyst for community transformation. These fees fund vital initiatives like The Connector, which links those in need with essential resources, and On the Table, fostering community dialogue and collaboration. Alongside other programs, these efforts address local challenges and drive progress.

Your support enables us to turn innovative ideas into impactful actions, creating a more connected and resilient community. Every dollar you contribute helps shape a brighter future for West Georgia. Thank you for your commitment and for being an integral part of our transformative journey.



Together, we are not just supporting initiatives—we are transforming our community.

Contact the Community Foundation of West Georgia at **770-832-1462** or **info@cfwg.net** to learn more.





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PARTNER WITH US



You may be thinking about how your giving represents your values and vision for a stronger community. Turn to the Community Foundation of West Georgia as your resource to create a legacy that best exemplifies your generous spirit and care for community. We can help you develop a personalized giving plan today.

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Chief of Staff

Contact the Community Foundation of West Georgia at [770-832-1462](tel:770-832-1462) or info@cfwg.net to learn more