



Ordinary people
can do
extraordinary
things.

Report to the Community - September 2010



**COMMUNITY
FOUNDATION**
OF LETHBRIDGE AND
SOUTHWESTERN ALBERTA

*Formerly known as the
Lethbridge Community Foundation*

“Did you notice our name change? We believe the new name:
Community Foundation of Lethbridge and Southwestern Alberta
is much more descriptive of all the communities we serve.” ~ Phyllis Hutchinson, President



Phyllis Hutchinson,
President



Board of Directors

Phyllis Hutchinson
President (Skiff)

Barbara Cavers
Vice-President (Monarch)

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Secretary/Treasurer (Lethbridge)

Dennis Hatt
Director (Lethbridge)

Larry Helland
Director (Lomond)

Dianne King
Director (Lethbridge)

Corrine Klassen,
Director (Coaldale)

Joan Paradee
Director (Taber)

Wayne Street
Director (Coaldale)

Murray Pritchard
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Gwen Van Raalte
Director (Lethbridge)

Ed Sinnott
Director (Pincher Creek)

George Hall
Executive Director

Committee Members:
Blaine Thacker - Grants
Deborah Wescott - Grants
Laura-Marie Doenz - Grants
Lorne Armstrong - Investment
Barry Sawada - Investment
Sandy McKay - Governance

The Community Foundation of Lethbridge and Southwestern Alberta is publicly accountable and governed by a volunteer Board of Directors drawn from the communities served.
Registered Charitable # 119018349RR0001

President's Report

Ordinary people indeed do extraordinary things. In fact, many ordinary people have supported the Lethbridge Community Foundation over the past 44 years. Whether those ordinary people were donors establishing new funds, contributors to the existing funds, or volunteers on our Board of Directors, they have done extraordinary work through the Community Foundation to serve the communities of southwestern Alberta for today and for years to come.

During my term as a Board member, and now as President of the Community Foundation, I have been very pleased to participate in furthering our vision, which is to “act as a leader and a catalyst in enabling community development in southern Alberta.” At the end of the 2009 fiscal year, our endowment had grown to over \$12 million through the generous donations of individuals throughout the region. It is carefully managed so that the investment income generated from the pooled donations will be returned to local charitable organizations involved in the grassroots activities that strengthen our communities. As you read through this report, you will find stories about both donors and recipients, stories which exemplify our ongoing commitment to our vision of growing stronger communities through a lasting legacy. Because the Community Foundation uses the income from the pooled donations – which are added to an ever-increasing endowment fund - the donors’ charitable dollars continue to work long after the original donation is received. In 2009, we were able, despite the market downturn, to distribute close to \$157,000 in grants, and this year, we have distributed nearly \$154,000. As you read through the list of organizations who have received grants, you will see a diverse array of organizations who have been able to carry out a variety of community building projects as a result of these grants.

Over the years the Community Foundation’s reach has extended throughout the southwestern part of the province, in grants given to community charities located in dozens of small towns and villages surrounding Lethbridge, and also in the generous endowments given to the Community Foundation from donors living in these areas. This year, the Community Foundation has acknowledged our regional nature by changing our name from Lethbridge Community Foundation to **Community Foundation of Lethbridge and Southwestern Alberta**. We feel the new name better represents our ongoing dedication to the whole region.

I would like to thank the Board members who, after two three year terms, left the Board this year. John Van Nistelrooy from Enchant, and Bruce McKillop and James Enman, both from Lethbridge, have been hard working, dedicated volunteers whose contributions have helped shape and guide the organization. Thank you, as well, to Carmelle Steel from Claresholm, for her term on the Board. I would also like to welcome new Board members, Dennis Hatt and Gwen Van Raalte of Lethbridge, Corrine Klassen of Coaldale, and Joan Paradee of Taber. The commitment these volunteers offer is one of our greatest assets.

I encourage you to support the Community Foundation at our upcoming **Friends of the Foundation Dinner** on September 23, where we will celebrate our success with our many supporters. **The Buck Starts Here Trade Show** on November 4 & 5 will feature speakers who are experts in the fields of planned giving and fund development, offering assistance to local charities who are looking for funding opportunities. On behalf of the Board and staff, I look forward to seeing you there!

Phyllis Hutchinson

Phyllis Hutchinson, President



RAYMOND AQUATIC CENTRE

There's no better place to be in the summer than at the Raymond Aquatic Centre. Built last year, the aquatic centre is a wonderful facility for children of all ages and abilities. Mom Jill Williams, pictured right, and her son Blaise love the new pool, especially the tot area and new slide purchased with a grant from the Community Foundation of Lethbridge and Southwestern Alberta. Facility Manager Kinsey Holt, left, asked families what extras they needed at the new facility and then she applied for a Community Foundation grant for the new tot slide and shade structures. "The shaded areas were really needed and appreciated," said Holt. "We couldn't have added these features without the support of the Community Foundation." The tot slide is a popular spot for young children, some like Blaise who are more timid about the water, but not about sliding.

The Raymond Aquatic Centre is just one worthwhile project the Community Foundation has supported. With your donations, we can provide assistance to organizations in need in communities across southern Alberta.

A Charity for Charities

The Community Foundation of Lethbridge and Southwestern Alberta responds to grassroots community needs and has distributed \$6 million in grants since 1966. Through the power of community endowment building this support will continue forever.

Did you know?

That the Community Foundation of Lethbridge and Southwestern Alberta...

- **Continues to grow**

The Community Foundation began with a \$500 donation in 1966 and now holds over \$12 million in permanent endowment funds provided by donors in our communities.

- **Accepts donations in a variety of ways**

You can donate cash or other assets including life insurance policies, land and securities. You can leave a gift in your will to the Community Foundation, establish a charitable remainder trust or name the Community Foundation as a beneficiary of your RRSP or RRIF.

- **Can advise you on tax benefits when donating to the Community Foundation**

Without any obligation, and in strict confidence, we are happy to provide this information.

- **Distributes grants to local charitable organizations each year**

In 2009 \$210,524 was given to local groups in your communities. Community impact grants awarded \$156,715, and donor-designated grants \$53,809.

- **Offers great flexibility in choosing how your donations will be used**

The Community Foundation looks forward to working with you to meet your individual needs and wishes. See the Funds section in this report for more information on the options we offer.

- **Provides grants to organizations across southwestern Alberta**

The Community Foundation provides grants in the areas of arts and culture, human and social services, health, recreation and environmental conservation. To be eligible, an organization must have a registered charity number. Please call 403-328-5297 for information or visit our website for applications, guidelines and deadlines.

How to Get Involved:

The Community Foundation of Lethbridge and Southwestern Alberta can help you to support the areas that you choose through one of the following:

- 1 Create your own legacy by setting up a new fund.**
- 2 Contribute to an existing fund, such as the Community Caring Fund.**
- 3 Promise a future gift through a will, estate, or life insurance.**
- 4 Discover flexible options for donating - call 403-328-5297.**
- 5 Attend our Friends of the Foundation Dinner, September 23, 2010** featuring **Joan McCusker**, Honourary Ambassador of the Sandra Schmirler Foundation. Through her experiences as a teacher, mom, world champion curler, Olympic Gold Medallist and CBC Commentator, Joan has collected a number of observations on the attitudes that propel **ordinary people to build extraordinary lives**. Tickets are \$45 and available by calling the office at 403-328-5297.



Thank you to our 2009 Donors

People from a variety of walks of life make lasting investments in our communities by supporting the Community Foundation of Lethbridge and Southwestern Alberta. No matter the size, all gifts to the Foundation have impact because they are pooled and permanently invested to generate income for granting.

Lorne Armstrong
Richard & Denise Aucoin

Rick & Marlene Austin
Avison Young Real Estate Alberta, Inc.
Stephen Bertulli
Dustin Bosch

Barrie & Marion Broughton
Miles & Betty Bourke
Wendy P. J. Carson

Barbara Cavers
Harry & Mildred Cox

Paul Dalseg
Edward & Maureen Dawson
Edward & Denise Dorosz

James Enman
David Erlandson
Estate of Harold Carl Hansen
Estate of Ernest K. Schumacher

Keenan Fowler
Gas King Oil Co. Ltd.
Carol & Robert Giesbrecht

George Hall & Maggie Macdonald
Marilyn & Vaughan Hembroff
Barbara & Eric Hillman

Dr. Robert Hironaka
Theresa Hrkac
Phyllis & Lynden Hutchinson

Ron & Mariette Jacobson
Arron Kardolus-Wilson
Veronica & Albert Kenwood

Kevin & Trish Kindley
Ian & Mary Ann Kinnell
Brandon & Mikaila Koehler

Wayne & Hazel Krywolt
Norman Laflamme
T. Frank Lightbound

Kaylan Lundquist
Alastair & Dale MacLean
Mac & Barb MacLean
Douglas MacLeod
Stan Maier

Sandy & Carol McKay
Margaret M. McKay
Bruce & Margaret McKillop
Tom & Lou McNab

Robert Moffat
Walter Montina & Family
Rod Morrice

Zoltan & Susann Nagy
Stan & Grace Noreika
Philip North

Ludvik Pahulje, Jr. & Jehan Cassis
Pahulje Enterprises Ltd.
Nellie Parsons & Family

Ken & Gayle Piecharka
Kenny Piecharka
Eugene & Kathryn Ponomar

Jim & Eila Pronger
Colleen Proudfoot
Garry Proudfoot

Jeffery & Charmaine Proudfoot
Judith Proudfoot
Sharee Proudfoot

Dick & Mary Quon
Karen Reid
John Ross

Barbara Russell
Terry Sander
Joe & Shari Schwark

Brian & Mary Searby
Jim & Lynda Spenceley
Tyler Stella

Calvin & Anne Stewart
Sun Life Financial
Chad Swancoat

Irene Toderovich
Phil Washburn
Denise Wallin

Colin & Dionne Walsh
Heath Williamson
Kenneth Williston

Lyle Wunderlich
Megan Yanosik
Anonymous (3)

Life Insurance Policies

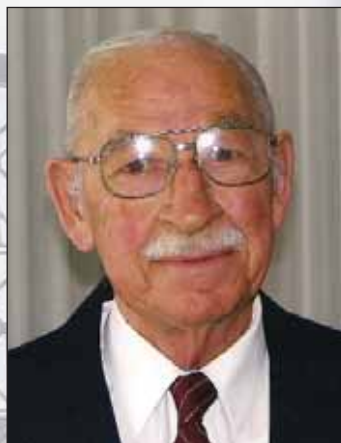
Lottie Austin
Joyce Dunlop
Anne Raslask
Dr. J. B. Stillwell
Anonymous (1)

Mission: *The Community Foundation of Lethbridge and Southwestern Alberta provides an effective, flexible method for philanthropic individuals of all means to connect to worthy causes in southwestern Alberta.*

Ordinary People Creating Lasting Legacies

JOHN GOGO

Through a suggestion from his accountant over 15 years ago, John Gogo established a Donor Advised Fund with the Community Foundation of Lethbridge and Southwestern Alberta. Starting with a \$60,000 donation, John decided he would create a fund and with the interest earned, personally present cheques to charities of his choosing. Since 1995, John has presented over 300 cheques totalling over \$50,000 in grants to local groups.



“Who would have thought I’d be able to help so many people,” said Gogo. Establishing this type of a fund allows John to decide which groups benefits from the annual earnings – a job he takes seriously. He prefers to support local youth organizations and chooses them very carefully. “The youth are our future,” says Gogo.

As a war veteran, who currently serves as the President of the Korean Veteran’s Association in Lethbridge, he also supports local sea, air and army cadet groups.

John is just one example of ordinary people doing extraordinary things. You can create your legacy by establishing your own fund. Please contact us for more information on how easy and rewarding this can be.

“I know what this Foundation has accomplished in our community and the way it has grown. It’s been very successful and is such a great asset to the people of this area. But, I also know there’s so much more that could be done.”

- John Gogo, Lethbridge



Donor Advised Funds

How Does a Donor Advised Fund Work?

Anyone can start an endowment fund - for yourself, your family, a group of friends, an organization, a business, or someone you wish to honour.

You can build an endowment fund at a pace that fits your ability to give. You could continue to build your endowment fund, and if you wish, make a ‘flow through’ donation to the charity of your choice or give a scholarship. For example, you could make a tax deductible donation of \$1,000 with \$500 to be invested in your endowment fund and \$500 provided as a grant or a scholarship. You can also choose to stay personally involved in directing the grants to the causes of your choice. A charitable tax receipt will be issued in the year that the donation is made.

Join us as one of the foundation’s donors, who in 2009 contributed \$53,809 through donor-directed endowment funds to specific charities and a number of scholarships and awards.

Call the office staff at 403-328-5297 for more information or to discuss how to begin your donor advised fund.

***Do what you can,
with what you have,
where you are.***

- Theodore Roosevelt

For more information on making a gift or establishing a fund, visit www.lethbridgecommunityfoundation.ca, or call 403-328-5297.

Our Mission in Action: Community Impact Grants 2009 & 2010

The Community Foundation of Lethbridge and Southwestern Alberta is a 360 degree funder, serving all charitable sectors and communities in southern Alberta. All community grants form the donor's legacy – everyone can help through tax deductible donations to the Community Caring Fund, or establish a fund through an emerging fund. All donations are kept forever and the investment income is used for grants.

2009 COMMUNITY GRANTS

Arts and Culture:

Blackfoot Canadian Cultural Society **\$2,000** (Tipi)
Canadian Grain Elevator Discovery Centre **\$2,000** (Facility repairs)
Claresholm and District Museum **\$1,426** (Replacement of mannequins)
Coalhurst High School **\$3,000** (Digital piano)
Empress Theatre Society **\$5,000** (Sponsorship of original composition)
Gem of the West Museum Society **\$2,500** (Stage lighting)
Magrath Public Library **\$1,205** (Computer)
Picture Butte High School **\$5,000** (Band instruments)
Southern Alberta Art Gallery **\$1,400** (Tables)
Taber and District Museum Society **\$2,000** (Digital preservation project)

Environmental Conservation & Recreation:

Canyon Church Camp Association **\$5,000** (Generator for appliances)
Oldman Watershed Council **\$3,500** (Training workshop)
St. Catherine's School **\$825** (Tree planting for playground)
Town of Raymond **\$5,000** (Raymond Outdoor Aquatic Centre)
YWCA of Lethbridge and District **\$2,314** (Purchase fitness machine)

Health & Wellness:

Crowsnest Pass Health Foundation **\$7,500** (Surgical suite endoscope)
Easter Seals Alberta **\$10,000** (Mobility equipment)
Fort Macleod and Dist. Health Foundation **\$2,500** (Lights)
G.R. Davis School **\$1,900** (Canteen upgrade)
Windy Slopes Health Foundation **\$5,000** (Gastroscope purchase)

Human & Social Services:

Big Brothers Big Sisters - Lethbridge & District **\$2,000** (Renovations)
Camp Carmangay **\$2,500** (Program support)
Children's World Daycare Society **\$2,000** (Kitchen upgrade)
Claresholm Animal Rescue Society **\$1,600** (Construction)
Crossroads Counselling Centre Society **\$2,300** (Renovation)
Interfaith Food Bank **\$6,838** (Software)
Kids Help Phone **\$1,400** (Distribution of information)
L'Arche Association of Lethbridge **\$2,871** (Washers and dryer)
Lethbridge Association for Community Living **\$2,500** (Educational program)
Lethbridge Community Network **\$9,985** (Refurbishing of facilities)
Lethbridge Food Bank **\$6,838** (Software)
Lethbridge Legal Guidance Society **\$350** (Computer equipment)
Lethbridge Meals on Wheels **\$10,000** (Assistance with supplying meals)
Prairie Winds Clubhouse Society **\$2,000** (Technology)
Rainbow Literacy Society **\$1,800** (Literacy bag items)
South County Treatment Centre **\$5,000** (Mattresses)
South Region Parents as Teachers **\$2,400** (Prevention pilot project)
Southern Alcare Society **\$3,663** (Renovation project)
Streets Alive Family Support Association **\$5,100** (Mattresses)

TOTAL 2009 GRANTS TO COMMUNITIES: \$ 156,715

2010 COMMUNITY GRANTS

Arts and Culture:

Foremost Municipal Library **\$1,000** (Wooden end panels)
Lethbridge Symphony Association **\$4,424** (Extended Range Chime)
Shinah House Foundation **\$6,000** (Recreational and cultural centre)
Fort Whoop-Up Interpretive Society **\$2,000** (Display audio technology)
Lethbridge Library Board **\$5,000** (Children's picture books)
Readymade Community Association **\$3,716** (New room furnishing)
Crowsnest Pass Ecomuseum Trust **\$2,000** (Lamps for Bellevue Mine)
Oldman River Antique Equipment & Threshing Club **\$4,000** (Hall renovations)
St. Joseph School **\$2,500** (Band instruments)
Enchant Community Association **\$4,000** (New suspended ceiling)
Arrowwood Municipal Library Society **\$2,000** (Paperback/media spinners, ceiling fan)
Raymond Public Library **\$1,500** (Updated audio/visual material)
Glenwood Municipal Library **\$3,000** (Shelving, display units, furniture)
Warner Memorial Library **\$5,000** (Exterior renovation)

Environmental Conservation and Recreation:

Father Leonard Van Tighem School **\$3,000** (Playground equipment)
Friends of St. Michael's School **\$5,000** (Playground equipment)
Stavelly and District Agricultural Society **\$5,000** (Paint for arena exterior)
Champion Swimming Pool Society **\$10,000** (Ground work for new pool)
Turin Community Curling Club **\$5,000** (Items for the Kitchen)
Vauxhall Academy of Baseball **\$5,000** (Flooring, fitness equipment)
Southern Alberta Bible Camp 1978 **\$5,000** (Gym equipment)
Village of Stirling **\$5,000** (Community hall commercial kitchen upgrades)

Health and Wellness:

Canadian Mental Health Association, Alberta South Region **\$4,000** (Roof replacement)
The Canadian Red Cross Society **\$10,000** (HubScrub unit)
The Safety City Society of Lethbridge **\$5,000** (Building renovations)
Lethbridge Area Search and Rescue Association **\$6,320** (Technology)
The Canadian National Institute for the Blind **\$1,635** (Office equipment)
Friends of Green Acres Seniors Society **\$6,028** (Patient transfer lift)
Town of Magrath **\$5,000** (Purchase of exercise equipment for Diamond Willow Park)

Human and Social Services:

Volunteer Lethbridge Association **\$5,000** (Website redevelopment)
Gilbert Paterson Middle School **\$1,300** (Purchase of appliances)
Taber Food Bank Society **\$5,000** (Warehouse purchase)
Village of Warner **\$9,000** (Vehicle evacuation tools)
Pioneer Lodge of the Willow Creek Foundation **\$4,000** (Dining upgrades)
Vulcan Extencicare Auxiliary **\$2,500** (Furniture for common areas)

TOTAL 2010 GRANTS TO COMMUNITIES: \$ 153,923



EASTER SEALS ALBERTA

Annette Nuszdorfer is a vibrant woman who has her mobility back. In December 2007, Annette suffered a stroke that paralyzed her right side. She was only able to walk short distances with the use of a cane and was left feeling limited in the places she could go. A Community Impact Grant from the Community Foundation was provided to Easter Seals Alberta, who in turn provided Annette with a scooter through their Total Access Program. "As a result of the partnership with the Community Foundation of Lethbridge and Southwestern Alberta, Easter Seals Alberta provided eleven scooters, three power wheelchairs, two lift assist chairs, a bed, a van lift and a vehicle adaptation within the span of eight months," said Paula Mankinen-Irvin, Major Gifts Officer, from Easter Seals Alberta. Annette's husband and caregiver Rudy is overjoyed with the scooter. Rudy explained that Annette can now assist him with grocery shopping, join him on adventures in Waterton National Park, and take in the Dragon Boats on Henderson Lake. Since receiving the scooter, Rudy has said that their quality of life has greatly increased. "Annette and I are now able to participate in watching our grandkid's sports," said Rudy.

Annette is just one of the individuals whose lives have been touched from Community Impact Grants Program through the Community Foundation. With your donation, we can provide assistance to more individuals in need in communities across southern Alberta.

**An opportunity for charities
not to be missed!**

THE BUCK STARTS HERE

November 4 & 5, 2010

Looking for funding to support your work is a never-ending job. Meet face-to-face with funding agencies and explore ways to grow your charity. Not-for-profit community organizations are invited to meet and learn from a wide range of trade show funders and support services. Join us in Lethbridge for **The Buck Starts Here**, a trade show of expert speakers, financial funders, and service providers who support organizations like yours.

LEARN HOW TO TELL THE STORIES OF YOUR CHARITY

Norma Cameron, leading expert in story development, will provide practical basic strategies for an organization to use to set it apart from everyone else.



USE THE POWER OF PLANNING TO BUILD YOUR ORGANIZATION

Andrea McManus, internationally recognized leader of philanthropy, will inspire your organization to build community support and provide the basics of integrated planning.



GUY MALLABONE WILL PRESENT HIS COMMON SENSE APPROACH TO STRENGTHENING YOUR ORGANIZATION.

Conference registrants will have the opportunity to meet this leader in fund development in his new role within Mallabone & Associates.



For more information on attending, contact the office at 403-328-5297 or find more details at the website at www.lethbridgecommunityfoundation.ca



\$6 Million In Grants for Southwest Alberta since 1966

SOCIAL SERVICES

\$1,615,682 in 419 grants

ARTS & CULTURE

\$1,190,465 in 390 grants

SPORTS & RECREATION

\$908,172 in 134 grants

CHILDREN & YOUTH

\$508,908 in 238 grants

EDUCATION

\$507,383 in 183 grants

HEALTH

\$414,548 in 137 grants

SCHOLARSHIPS

\$250,128 in 373 grants

SENIOR CITIZENS

\$188,535 in 64 grants

HERITAGE & RESTORATION

\$136,835 in 58 grants

ENVIRONMENT

\$28,325 in 7 grants

ANIMAL WELFARE

\$25,449 in 9 grants

OTHER - General

Community Services
\$215,737 in 75 grants



Funds

Community Impact Endowment Funds

Many public-spirited citizens have established permanent endowments of unrestricted funds with the Community Foundation of Lethbridge and Southwestern Alberta. The investment income from the Community Impact Funds provides the funding for Community Impact Grants program each year. The Grants Committee accepts funding applications from registered charities. The applications are evaluated to ensure they address community needs.

Dr. Jesse K. Bigelow Estate
R.F. Patrick Bowman Estate
Ruth Chapman Memorial
Dale Clark Estate
Herb & Agnes Dunham Fund
George Ellis Estate
Esther Elford Memorial
Jesse M.O. Hardie Estate
Nancy & Fred T. King Estate
Alastair & Dale MacLean Endowment Fund
Alexander Marnoch Estate
Bruce & Margaret McKillop Endowment Fund
Memorial Tributes Fund
Maurice & Molly Mitchell Memorial Endowment
Don Morris/Gas King Memorial Fund

Winnifred Bernice Muir Estate
Amile Christine Nelson Estate
Kenneth & Edna Owen Estate
James Rinehart Estate
Rinehart Ranches Ltd. Fund
Bill Russell Memorial
Kenneth Schumacher Estate
Mary & Bill Skelton Estate
George Stevenson Estate
Walter 'Stubb' Ross Time Air Inc. Memorial Fund
Agnes & Louis Turcotte Estate
Harold Carl Hansen Fund
Ladies of the Oldtimers Pemmican Club
Lethbridge Ironworks Co. Ltd.
Ernie Snowden Memorial Fund

Community Caring Fund

The Community Caring Fund enables people to make general donations to the community foundation in support of the annual community grants program. This is an open endowment fund that welcomes tax deductible donations at anytime.

Administrative Support Funds

Administrative Support Funds assist with the Community Foundation's various activities in development, grant making and communications. The following donors have established administrative support endowment funds:

Phyllis & Neil Manning Endowment
Gert & Les Talbot Endowment

Margaret McKay Endowment
Pahulje Enterprises Ltd. Administrative Endowment

Founders Trust Fund

The Founders Fund provides operational support funds for the Community Foundation. This is an open endowment fund that welcomes donations of any size.

Emerging Endowment Funds

Emerging Endowment Funds enable individuals and families to establish an endowment fund over a period of time. With a commitment of a tax deductible donation of \$1,000 a year, grants will be distributed to the community once the fund reaches \$10,000.

Tom & Deb Ackerman
Richard & Denise Aucoin
Richard & Marianne Gray Family
Mac & Barb MacLean
Tom & Luella McNab
Montina Family
Van Nistelrooy Family
Anonymous (1)

Clarence & Johanna Arnoldussen
Barbara Cavers
Kevin & Trish Kindley
Douglas MacLeod
Martin Brothers Funeral Chapels Ltd.
Dick & Mary Quon
Megan Yanosik

New in 2009: Barbara & Eric Hillman
George Hall & Maggie Macdonald



RBC Phillips, Hager & North

RBC Phillips, Hager & North Investment Counsel is proud to provide discretionary wealth management services to the Community Foundation of Lethbridge and Southwestern Alberta, and pleased to assist the Community Foundation as a sponsor of the 2010 Report to the Community.

Two Industry Leaders, United
When two strong firms unite, the best of both can emerge. In the world of wealth management, there is no better example than the union of RBC Private Counsel Inc. and the private-client business of Phillips, Hager & North Investment Management Ltd. Our flexible and truly personal private-client experience is backed by the strength, stability and breadth of RBC®, one of the world's premier financial institutions.

We offer everything required to effectively manage private and community wealth, including sophisticated investment management, banking, estates, trusts, charitable gifting and business succession planning.

Contact:
Melissa Best MBA, CFA
RBC Phillips, Hager & North Investment
Counsel
Suite 4430, 888 - 3 Street SW
Calgary, AB T2P 5C5
mbest@phn.com
1-888-880-5588

Field of Interest Funds

Field of Interest Funds enable donors to designate a specific area of interest in which charitable grants are made. The Community Foundation uses its discretion each year to select the most appropriate recipients.

1996 Lethbridge Alberta Winter Games Fund - Youth and culture support
2001 Alberta Seniors Games Fund - Senior's program support
Delores M. Brown Athletic Bursary Fund - KidSport Canada
W.G. Clarke Memorial Endowment - Kiwanis Music Festival Award
William & Phyllis McDonell Endowment - Support of musical endeavours in Lethbridge
Linda Lou Barvir Memorial Endowment - Family and Children support
BridgeAlta Jaycees Infant Child Safety Fund - Infant child safety support
Canadian Suicide Prevention Association Fund - Suicide Prevention support
Alain Rains & Sue Rains Endowment Fund - Rural community support

Managed Funds

The Lethbridge Community Foundation administers and manages funds for charitable organizations as a public service. These funds are not endowed with the Community foundation and each fund requires a special management agreement.

Lethbridge First Baptist Church Hosanna Fund
Lethbridge Therapeutic Riding Association Managed Fund
St. Augustine's Anglican Church of Lethbridge Fund
Kiwanis Music Festival Endowment Trust

Agency Funds

Charitable organizations may establish permanently endowed funds to provide a source of annual income for operations and programs.

Big Brothers Big Sisters of Lethbridge & District Endowment Fund
Joanna Perlich Endowment Fund - Lethbridge Therapeutic Riding Association
Alberta Legal Heritage Fund
Fort Whoop-Up Endowment Fund
Historical Society of Alberta (Southern AB) Fund
Safety City Society of Lethbridge
Southern Alberta Art Gallery Endowment Fund
Lethbridge Public Library Endowment Fund
Lethbridge Family Services Endowment Fund
Lethbridge and District Humane Society Endowment Fund

New in 2009: Friends of the Galt Endowment Fund - Sir Alexander Galt Museum
Kiwanis Club of Green Acres Lethbridge Scholarship Fund
Great Canadian Plains Railway Society Endowment Fund

Agency Funds

The Community Foundation of Lethbridge and Southwestern Alberta can assist local charities in developing sustainable funds to assist in the operations of the organization. Local non-profit agencies can set up their own endowment fund as a way to ensure a consistent stream of income that can be used to support their charitable work and other goals.

Donations to the endowment funds of the above list of agency funds will be tax receipted and accepted year round. A variety of options for giving are available and include:

- Tax deductible cash donations
- RRSP/RIFS donations
- Real estate or other assets
- Bequests in your will
- Appreciated securities

CONDENSED STATEMENT OF FINANCIAL POSITION AS AT DECEMBER 31, 2009

ASSETS	2009	2008
Current:		
Cash	\$ 100,234	\$ 87,466
Accounts receivables	3,189	3,118
Prepaid expenses	2,125	236
	\$105,548	\$90,820
Investments:		
Marketable securities	\$13,363,930	\$11,371,666
Cash surrender value of life insurance	\$267,471	191,391
	\$13,736,949	\$11,653,877
LIABILITIES		
Current:		
Accounts payable	\$49,448	\$12,347
Grants payable	39,229	6,000
	\$88,677	\$18,347
Managed Funds	\$864,246	\$724,782
	\$952,923	\$743,129
NET ASSESTS		
Fund Balance	\$12,784,026	\$10,910,748
	\$13,736,949	\$11,653,877

CONDENSED STATEMENT OF REVENUE, EXPENDITURES AND FUND BALANCES AS OF DECEMBER 31, 2009

REVENUE	2009	2008
Contributions	\$423,295	\$2,870,030
Investment income	436,743	362,704
Capital Gain (loss)	1,278,428	(2,116,778)
Change in CSV of life insurance	76,080	(25,353)
Administrative grants	50,000	50,000
	\$2,264,546	\$1,140,603
EXPENDITURES		
Grants	\$139,295	181,482
Flow-through grants	71,229	13,499
Operating expenses	180,744	142,372
	391,268	\$337,353
Excess of Revenue over Expenditures	\$1,873,278	\$803,250
FUND BALANCE, January 1, 2009	\$10,910,748	\$10,107,498
FUND BALANCE, December 31, 2009	\$12,784,026	\$10,910,748
CONSITING OF:		
Capital	\$13,267,763	\$12,829,118
Undistributed Income	\$(483,737)	\$(1,918,370)
	\$12,784,026	\$10,910,748

2009 Financial Information

The Community Foundation is committed to providing transparent financial information to the community. Complete 2009 financial statements, audited by BDO Dunwoody LLP Chartered Accountants, are available at www.lethbridgecommunityfoundation.ca, or by contacting the Foundation office.



McKillop Insurance & Registry Services Ltd. is proud to support the Community Foundation as a sponsor of this report. Since 1953, McKillop Insurance & Registry Services Ltd. has been providing you with the security and knowledge that you are well taken care of for all your insurance and registration needs.

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***“People can be divided into three groups:
those who make things happen, those who watch things happen,
and those who wonder what happened.”***

~ Nicholas Murray Butler

Join the ranks of those who make things happen and support your community foundation. We welcome all enquiries and follow a strict “no obligation, confidential” approach to anyone who wishes to discuss how they can make a difference in their community.

Community Foundation of Lethbridge and Southwestern Alberta

404 - 8th Street South, Lethbridge, AB T1J 2J7

Phone: 403-328-5297 Fax: 403-328-6061

Email: office@lethbridgecommunityfoundation.ca

Printed for distribution August 2010

Canada Revenue Agency Charity BN/Registration Number is 119018349RR0001