By the numbers

- $258M Total Assets
- $33M Grants and Scholarships Distributed
- $24M Contributions
- 492 Funds Under Management
- 80 Nonprofit Trainings
- 1,820 Training Participants
- 16,815 Guests visited Wells Center

Founder Richard E. Goldsmith Retiring After 52 Years of Service

Goldsmith family’s legacy is felt throughout community

The San Antonio Area Foundation began as a tribute to Nat Goldsmith, a unique man who cared deeply for our community. Gregarious and fun-loving, Nat was a well respected civic leader, beloved and generous friend, talented businessman and devoted father.

When he died in 1963, Nat’s brother, Mannie, challenged Nat’s son, Richard, to find a permanent way to honor Nat. “What our community really needed was a permanent endowment that could fund a variety of causes. I discovered that there were such things. They were called community foundations,” said Richard. He created the Nat Goldsmith Memorial Trust in 1963, leading to the Area Foundation’s establishment in 1964.

From humble beginnings, starting with a $10,000 gift, the San Antonio Area Foundation is now a powerful force for community good. The Area Foundation awarded its first grant of $868 in 1965 and its first scholarship of $100 in 1969.

Today, the Area Foundation manages nearly $260 million in assets and 492 funds. In 2014, the Area Foundation distributed $22 million in grants and scholarships. With its remarkable growth, the Area Foundation continues to honor the Goldsmith vision by helping donors achieve their charitable goals for the greater benefit of the community. Thank you, Richard, for your vision and service!

Richard E. Goldsmith retires after 52 years of service to the San Antonio Area Foundation.

It has been an enormous pleasure and privilege to work for the San Antonio Area Foundation. Before I came here, I had no idea how much time, effort and creativity every member of the staff devoted to this organization. All of you are amazing.

Richard E. Goldsmith
Honing the Legacy of our Founding Family

From the President & CEO of your community foundation

Dear Friends,

We talk a great deal about legacy at the San Antonio Area Foundation. We ask ourselves, “What will people remember about me after I am gone?” The Area Foundation is here today because of the desire to leave a legacy.

At the heart of the Area Foundation’s legacy is our founder, Richard E. Goldsmith. After more than 50 years of service, Richard has announced his retirement. Richard established the Area Foundation in 1964 to honor his father, Nat Goldsmith.

The Goldsmith legacy in San Antonio dates to the late 1800’s. Leopold Goldsmith, Nat’s father, moved the family from Pine Bluff, Ark., where he had served as mayor. Nat Goldsmith graduated from Main Avenue High School in 1906 and then started work in the wholesale produce business, supplying groceries, hotels and restaurants on a route that stretched to Kerrville and Fredericksburg.

Nat was very active in the Jewish community, but he derived his greatest pleasure from serving the community at large. He helped create an organization in the 1930s assisting German Jewish refugees in finding work. He became one of the youngest businessmen to serve as president of the San Antonio Chamber of Commerce. He was also one of the founders of the San Antonio Community Chest, now called the United Way.

After he died in 1963, his brother, Mannie Goldsmith, charged his nephew Richard with coming up with a trust that would be a lasting memory. More than 50 years later, the Area Foundation continues to honor the life of Nat Goldsmith.

We are forever grateful for Richard’s service, wisdom and guidance. The entire community feels the Goldsmith legacy, and we have Richard Goldsmith to thank.

With gratitude,

Dennis E. Noll
President & CEO

Our Mission

...helping donors achieve their charitable goals for the greater benefit of the community

Workforce Skills Training Program Helps Individuals Secure Stable, Quality Employment

In 2014, the Area Foundation distributed $19.9 million in grants to nonprofits.

Project Quest received a grant in 2014 from the San Antonio Area Foundation to assist employees entering the workforce with licensing fees for their occupations.

“Thanks to the San Antonio Area Foundation, Papy secured his registered nurse licensing and now works as a registered nurse. He is able to provide for his family.”

Pearl Caesar
Executive Director, Project Quest

Papy Muco is a refugee from the Democratic Republic of Congo. He survived war, attacks on his refugee camp and loss of family. He relocated to the United States and began working while taking English as a Second Language classes. After being connected with Project Quest, he began training as a registered nurse. High demand jobs (like RNs) that provide benefits and advancement opportunities typically require expensive licensing fees that can be out of reach for employees. That is where funding from supporters like the Area Foundation come in. Papy is now living his American Dream!

For a list of our grantees, visit saafdn.org/communitygrants.

Family Focuses Scholarship Fund on Graduates Pursuing STEM Education

The J&B Family Scholarship Fund was established by John and Barbara Moschner to support and encourage graduates pursuing the fields of science, technology, engineering and math (STEM).

“The San Antonio Area Foundation staff patiently answered our many questions. We are looking forward to an ongoing relationship as they award the funds to a local student,” said John and Barbara Moschner.

Welcome, new funds, to our family:

- Temple Beth-El/Great Hearts Agency Fund
- J&B Family Scholarship Fund
- Refugee Scholarship Fund

Funds opened from July 1 - September 30, 2015

We feel strongly that education is key to a successful quality of life. Since there is a shortage of graduates in science, technology, engineering and math, we decided to focus on these areas of education.”

John and Barbara Moschner
J&B Family Scholarship Fund Representatives
The San Antonio Area African American Community Fund brings together leaders to unite and inspire African Americans to invest in the community.

Dedicated volunteers engage in fund development, networking and community building. This outreach fund of the San Antonio Area Foundation is building a permanent endowment that will support nonprofits with grants for generations to come.

Opportunities for involvement include: the Rising Professionals group, which connects young leaders in giving and community, and the Fund’s annual Renaissance with the Stars event, celebrating the rich history of music and dance.

Since 2008, more than $70,000 in grants has been distributed to nonprofits serving African Americans in our community.

The grant funding we received helped with our Lego League program. This program educates students on robotics, problem solving and working in groups. The African American Fund’s support is so important to our work. Thank you.”

Devetha Thompson
National Society of Black Engineers, Jr. Chapter

The San Antonio Area Foundation continues to honor the memory of John L. Santikos by distributing memorial gifts throughout 2015. Below is a list of funding to date:

- $500K to Doctors Without Borders
- $500K to International Orthodox Christian Charities
- $500K McNay Art Musem ($100k), San Antonio Museum of Art ($200k) and Say Si ($200k)
- $255K in matching gifts to The Big Give S.A.
- $200K to United Way initiatives
- $150K to St. Sophia Greek Orthodox Church
- $100K to the American Red Cross for Texas Spring Storms

Nearly $2 million will be added to the Area Foundation’s 2015 annual competitive grants program. We will distribute $6.5 million throughout 2015 in several of Mr. Santikos’ designated areas of interest. A formal grantmaking strategy will be adopted and announced in 2016.

Leaders Unite to Serve Community
Community Outreach Spotlight: San Antonio Area African American Community Fund

Collective effort benefits military and veterans
Community Initiative Spotlight: Military Initiative

Since its formation in 2012, the Military and Veteran Community Collaborative (MVCC) has partnered with more than 100 organizations actively serving veterans, transitioning military personnel and their families. The goal of this collaborative effort is to improve organizations’ abilities to serve veteran and military families by developing better access to services and creating pathways to sustainable living and success.

The San Antonio Area Foundation provides key leadership to MVCC by convening stakeholders and establishing relationships with key partners. Nearly 2,000 people have been involved in this effort, and MVCC is now a registered 501(c)(3) nonprofit organization. Its passionate and active board of respected military veterans and civic leaders oversee three solutions teams that are focused on employment and education, health and wellness and housing issues for our military and veteran community.

Since 2008, more than $70,000 in grants has been distributed to nonprofits serving African Americans in our community.

The San Antonio Area African American Community Fund brings together leaders to unite and inspire African Americans to invest in the community.

Year End Tax Savings Checklist
Here are some money-saving tips to lower your taxes for 2015.

- GIVE charitable gifts before December 31 to reduce your income taxes.
- USE all of the money in your Flexible Spending Account before it’s lost.
- PAY your January mortgage payment early and add to your mortgage deduction this year.
- ASK your accountant what taxes may be paid this year to reduce your tax bill.
- ADJUST income tax withholding on your employer’s W-2 Form, if needed.
- CONTACT your tax advisor and call or email us for more ideas on how to save money on taxes this year.

For more information, contact Kathleen Finck, Director of Gift Planning, 210.242.4744, kfinck@saafdn.org.

Visit our planned giving center at saafdn.org
Investments With Heart

Investment strategy based on mission to provide for our community, forever

Gifts given to the San Antonio Area Foundation become part of a permanent endowment, benefiting our community forever. We invest the gifts we receive so they grow to address community needs.

Our investment goals are to preserve the original value of gifts in terms of inflation, and grow our assets as much as market conditions allow so we can address community needs now and in the future.

With recent market volatility and economic uncertainty on the horizon, we remain committed to the defensive investment strategy adopted in 2013.

For questions, please contact your designated relationship manager, listed on the top of your most recent fund statement and in your donor handbook.

In addition to the quarterly investment overview sessions, we will be adding monthly investment Q & A’s. The first will be on November 11 at the San Antonio Area Foundation from 8:30 - 9:30 a.m.

We offer three investment portfolios for our fundholders.

- Select Portfolio
- Traditional Risk-Managed Portfolio
- 60/40 Index Portfolio

Learn more about our investments at saafdn.org/investments.

Area Foundation Happenings

2015 Board Day

On September 22, Dr. Richard P. Chait, co-author of Governance as Leadership led our 4th Annual Board Day. More than 150 executive directors, CEOs and board members learned how to use leadership to be an effective board member for their organization.

7th Annual Renaissance with the Stars

More than 280 guests attended the 7th Annual Renaissance with the Stars gala. Five local celebrities had one goal: to raise funds and awareness about the issues and opportunities affecting the African American community. Learn more at saafdn.org/RWTS2015.

Welcome Breakfast for New Partners

Gavin Nichols, Director of Grants and Programs for the San Antonio Area Foundation shared about our Animal No-Kill Initiative with new community partners at the quarterly welcome breakfast. Learn more about this initiative at saafdn.org/animalnokill.
Important Reminders

Quick Connections Phone Call Update

Join us for Quick Connections, a 20-minute conversation covering our impact in the community. All Quick Connections phone calls take place from 8 - 8:20 a.m. CST. To join these calls, please dial 1-712-775-7031. Our meeting ID is 979-500-399. You do not have to R.S.V.P. to join the calls.

• San Antonio Area Foundation’s Nonprofit Certification Programs Wednesday, November 18, 2015

Listen to past calls by visiting saafdn.org/QuickConnections. Join the conversation online using #QuickConnectionsSA.

Save the Date! Get On Board

December 1, 2015

Nonprofits need talented people like you on their board of directors. If you’ve been considering joining a nonprofit board, Get on Board is for you! Learn more about this event at www.saafdn.org/GetOnBoard.

Important Year-End Reminders

Make a gift that helps others this time of year.

As 2015 comes to a close, take a moment to consider the gifts you would like to make this holiday season, and contact us if we can assist you in your year end giving.

☑ December 15, 2015 - Year end grant distribution deadline
To ensure all grants are processed and received in a timely manner, turn in your year end grant distributions or make your recommendations online as soon as possible; no later than Dec. 15.

☑ December 31, 2015 - 2015 gifts for tax purposes
For your donation to be considered a 2015 gift for tax purposes, please be sure the postmark date is December 31, 2015. Gifts may be made online until midnight on December 31.
Calendar of Events
All events are held at the Area Foundation’s Wells Center unless otherwise noted.

NOVEMBER

5  Government Grantwriting  
   9:00 a.m. - 3:00 p.m.
6  Grants Management Techniques  
   9:00 a.m. - 12:00 p.m.
10  Let’s Get Social!  
    9:00 a.m. - 12:00 p.m.
11  Investment Lunch-N-Learn  
    8:30 a.m. - 9:30 a.m.
12  Change Management  
    9:00 a.m. - 12:00 p.m.
18  Quick Connections Phone Call  
    8:00 a.m. - 8:20 a.m.
18  Create an Amazing Nonprofit Website  
    9:00 a.m. - 12:00 p.m.

DECEMBER

1  Investment Performance Review  
   8:45 a.m. - 10:00 a.m.
1  Get on Board!  
   5:30 p.m. - 7:00 p.m.
4  Legal & Accounting Institute  
   7:30 a.m. - 4 p.m.
15  Year End Grant Distributions Deadline  
    5:00 p.m.
17  To Be or Not To Be a 501(c)(3)  
    12:00 p.m. - 2:00 p.m.
17  Finding Funders Library Training  
    2:00 p.m. - 3:30 p.m.
31 2015 Gifts for Tax Purposes Deadline  
    Midnight

JANUARY

28  To Be or Not To Be a 501(c)(3)  
    12:00 p.m. - 2:00 p.m.
30  Board Bootcamp  
    8:30 a.m. - 4:00 p.m.

Save the date for our annual meeting: March 2, 2016.

Dates and times subject to change. Visit saafdn.org/calendar for registration information and complete details.

We’re social! Connect with us today.