

THE PITTSBURGH
FOUNDATION
QUARTERLY
Winter 2016

4

**FOCUS ON WESTMORELAND:
FOUNDING FATHER**

*A son of Westmoreland turns
family sorrow into an enduring
regional legacy.*

6

BECOMING THE CHANGE

*Students train to become
social justice leaders.*

10

QUIET DISTINCTION

*Fund empowers character and
community service builders.*

FORUM



SETTING THE STAGE

Donor-advised funds are building better futures.



ON THE COVER

Young ballerinas from Pittsburgh Ballet Theatre School watch as company dancers perform in the 2016 grand opening ceremony for the Ballet's new Strip District studio annex. Donors Dawn and Chris Fleischer co-chaired the campaign that funded the building. See page 8 for more.

PRESIDENT'S MESSAGE

IN THIS ISSUE

- 4 FOCUS ON WESTMORELAND: FOUNDING FATHER**
A son of Westmoreland turns family sorrow into an enduring regional legacy.
- 6 BECOMING THE CHANGE**
Students train to become social justice leaders.
- 8 BUILDING EQUITY**
Donors foster access and opportunity in the arts.
- 10 QUIET DISTINCTION**
Fund empowers character and community service builders.
- 12 Staff Notables:** Michelle McMurray, Charmelle Jackson and Ashley Hezel
- 14 Charitable Giving by Design:** Elizabeth Genter of Schenley Capital
- 15 New Instructions for Stock Transfers, Mutual Fund Donations and Cash Wires**

A LOS ANGELES COUPLE RETURNS to family roots in Pittsburgh and jumps into the arts scene in Downtown and Oakland — determined to grow their fund at our Foundation to be a transformative force in making the arts more diverse and accessible.

A successful Westmoreland County attorney is so impressed with our Foundation's donor base and strategic grant making that he leads a campaign to create a community foundation to be a transformative force for philanthropy in his home region. To make it even stronger, he leads the effort to merge it with our Foundation.

A North Hills, Pittsburgh family pivots from the tragedy of losing a 25-year-old police officer son/brother, a star in community and public service, to create a fund to be a transformative force in enabling all the organizations that developed him to develop others.

As part of my regular review of new donor-advised funds and new contributions to existing funds, I consider it a privilege to learn the background stories behind the intended purposes. Each offers a different point of inspiration. When offered collectively, as they are in this year-end issue of FORUM, they explain why community philanthropy has the potential to be one of the most reliable and powerful institutions we have for delivering transformative change that improves peoples' lives.

I share these stories in a holiday season buffeted by turbulence that continues from the November presidential election. Many of us in philanthropy are concerned about the federal government's role over the next four years in many areas of our work. On the world stage, "turbulence" under-describes the events in play. From Brexit to war and tension in the Middle East to the populist political movements sweeping across Europe, many of us worry about their effects on us as a country and a region.

In a time rife with uncertainty, I get assurance from these stories of individuals starting new funds or adding to existing funds to achieve ambitious goals for the future. Each donor's experience is ongoing proof of the assertion by America's cultural anthropologist, Margaret Mead: "Never doubt that a small group of thoughtful, committed citizens can change the world."

It is good counsel for our work next year ramping up 100 Percent Pittsburgh, the Foundation's organizing principle that is dedicated to bringing new opportunities to as much as one-third of the region's residents unable to participate in a revitalized economy.

We will not know for sure what needs we will encounter, nor how strong our partners will be, nor how effective our government may be. But we do know for sure how important our work is from neighbor to community to region, and we must double down on our commitment to be a transformative force.



RECORD SET FOR DONOR SKATERS AT PITTSBURGH'S ROCKEFELLER CENTER

The Foundation held its 15th annual skating event for donors at the MassMutual Pittsburgh Ice Rink in the PPG Place Plaza on Nov. 25.

The outing is increasingly popular as a holiday tradition for many, including, above, Estelle Fisher, age 7, who is steadied by her mother, Elinor "Elly" Fisher. The Fisher family of the Friendship neighborhood at Pittsburgh was among 260 skaters — a Foundation record — who took to the ice on a bright, crisp morning and enjoyed holiday treats such as hot chocolate. Many donors who participated at a young age now bring their children to skate. Others have become friends after meeting at the event and make a point to attend together each year.

Taxing Times

Donor-advised funds are an ideal strategy for managing tax uncertainty.

"Maximize Your Deductions Now. A Trump Presidency Means You Could Lose Them," the Nov. 18 Wall Street Journal headline stated. The Journal isn't alone in sounding the alarm bells. Tax analysts and advisors nationwide are doggedly following how possible changes to income tax rules under a Trump administration could reduce the value of itemized deductions in future years.

The early verdict: several significant tax deductions may become far less valuable or even disappear next year. Donor-advised funds, The Wall Street Journal stated, are an ideal mechanism for managing this uncertainty.

By establishing a donor-advised fund this calendar year, donors may take immediate tax deductions while maintaining the freedom to make charitable gifts when they are ready. This is especially important for donors who value the opportunity to research nonprofits and discuss charitable options with their families. It also provides time for donors and their advisors to tap the expertise available through the Foundation's Center for Philanthropy.

"Through the Center, donors are able to learn more about innovative nonprofits, connect with other like-minded individuals and learn directly from the experts in our Program and Donor Services departments," says Yvonne Maher, senior vice president for Development and Donor Services.

The takeaway: donor-advised funds offer tax benefits right away while eliminating the pressure to give the funds away immediately. To learn more about establishing a donor-advised fund this calendar year, contact the Development and Donor Services staff. Important deadlines and contacts are listed on the back cover of this issue.

**FOCUS ON
WESTMORELAND**



FOUNDING FATHER

A son of Westmoreland turns family sorrow into an enduring regional legacy

IN 1989, VINCENT QUATRINI was an attorney with a young family and a demanding practice in his native Westmoreland County, when someone dear to him died of a heart attack at age 40.

That Nicholas Cecchini was also his brother-in-law made the grief all the more searing. Quatrini's wife, Patty, was devastated over losing her brother so young. (Over the course of the next 12 years, the Cecchini family would also lose brothers Ned and Fred, and niece, Kimberly.)

In the months after his brother-in-law's funeral, Quatrini struggled: how could he memorialize Nick in a way that would preserve his life into the future?

"As an attorney, I would get The Pittsburgh Foundation's annual report, and I remember being so impressed with the numbers and the diversity of charitable funds. You could read about why a fund was started and the causes it supported. It was inspiring to see that all these people had done something for the good of the community, either out of personal tragedy, to honor someone in their lives, or champion a cause."

"Creating a memorial fund for [Nick] at The Pittsburgh Foundation would be very cool, but I started thinking – why couldn't we have something like the Foundation that was focused on Westmoreland County?"

Brandishing a copy of the Foundation's annual report, Quatrini took his idea to his fellow board members of Adelphoi, a Latrobe-based nonprofit providing a range of services to youth in precarious home and school situations. His fellow board members embraced the concept, and that was enough to carry Quatrini and other partner-founders, including Tina Thoburn, Hugh Dempsey and Myles Sampson, on a several-year quest to make it happen.

Adelphoi's Executive Director, Jim Bendel, recruited a consultant affiliated with the Lilly Endowment who had led an expansion of community foundations in the state of Indiana. "There was a standard reaction to our plan for a new community foundation for Westmoreland," says Quatrini. "Are you serious? There's no money

in Westmoreland to support a community foundation – this is not going to work."

Quatrini's response, according to friends and colleagues, was to double down on two traits for which he already was known: persistence and passion. He and Bendel developed an evidence-based case for its success. He recruited people with resources who had experience in charitable giving. "There was a core group of individuals and local foundations which 'got it'; they believed in the power of the community foundation concept and were willing to support it," says Quatrini.

True to prediction, the group was able to cobble together startup commitments from other Westmoreland-based foundations and a "Family of Founders." In 1995, the Community Foundation of Westmoreland County was birthed, and through the next two decades, has grown to include 200 funds with total assets closing in on \$22 million. While that progress is remarkable, it has not been nearly at the pace Quatrini and other founder-supporters envisioned.

Looking again to The Pittsburgh Foundation, CFWC board and staff saw another opportunity to fast-forward Westmoreland philanthropy. After many fruitful meetings, the Foundation and CFWC merged in the summer of 2010. "Six years into the merger, the CFWC roots are stronger than ever," Quatrini says.

"The memorial funds, field of interest funds, the Day of Giving, community convening, leading important Westmoreland initiatives, through CFWC, reflect the legacy of our family's tragic losses," Quatrini says.

While Quatrini leaves the CFWC Advisory Board this month after two decades of service, he will continue to champion the value of locally generated and locally benefitted community philanthropy, as a member of The Pittsburgh Foundation board of directors.

"CFWC was born of loss, grown by vision and sustained by persistence," he says, "and, now, as part of the Foundation, we are more effective conveners and poised to continue the good work of the many people who made this aspiration a reality."

In 1995, Vince Quatrini was the primary founder of the Community Foundation of Westmoreland County, which merged with The Pittsburgh Foundation in 2010.



BECOMING THE CHANGE

*Students train
to become social
justice leaders*



Front, left to right: Pittsburgh Brashear students Ghan Gajmer, Pabitra Gautam and Asiya Uwimana work with Bill Lucas of the LUMA Institute using design thinking methods to foster unity and diversity awareness at their school. Back, left to right: South Fayette students Amanda Oliver, Sreeja Gangineni and Dan Cardillo at work.

STUDENT ATHLETE, SCHOLAR, scientist, band member. The list of accomplishments on the application submitted by the four Montour High School students reads like a college admission essay. But the ambitions of these four students extend beyond the classroom: they are committed to creating a healthier learning environment as mental health advocates in their school.

Inspired by social studies teacher Joelene Hester, seniors Lindsay Bosco, Eric Macadangdang and Amanda Ramirez, along with junior Cassie Schiffhauer, were among 22 students from six schools who took part in The Pittsburgh Foundation's Students Working for Social Justice Program. The three-day accelerated learning academy, created by the Foundation in partnership with the LUMA Institute and The Ballay Family Fund, equips students with human-centered design skills so they can tackle critical issues in their schools.



The Change Agents program is among the Foundation's projects inspired by the 100 Percent Pittsburgh organizing principle, which engages people in frank, meaningful conversations about what they need to improve conditions in their communities, expand participation in the local economy and change policies that limit their future success.

In their essay, the Montour students argued that they saw glaring inequity in how students suffering from mental health issues are treated on a daily basis. They plan to use their Change Agents training to create education and awareness campaigns and small group interactions to foster healthy responses by teachers and fellow students.

"Mental health disorders are not 'just a phase' to be taken lightly," says Macadangdang. "By creating a support system for our students, we will break the stigma that surrounds mental health disorders."

Meanwhile, at Pittsburgh Brashear High School, junior Pabitra Gautam and seniors Asiya Uwimana and Ghan Gajmer are tackling a different challenge entirely: managing the profound cultural diversity that results when an international student body, some of whom are refugees, attends an urban public school. The three, who founded Brashear's Refugee Awareness and Aiding Refugees program last year, know the challenges well. Asiya was born in Tanzania and speaks Swahili, Kirundi and English. Pabitra and Ghan both came from Nepal and are fluent in both Nepali and English.

Nepali, African, Hispanic and Muslim students are among those most affected by discrimination resulting from prejudice and misunderstanding. For the affected students, academic performance and friendships suffer.

Writing in support of their application, English as a Second Language teacher Melissa Stanley shared that she's never worked with students so impassioned, dedicated and driven as Asiya, Ghan and Pabitra.

"Since these students are refugees, they have lived their lives very differently than the majority of Pittsburgh students," says Stanley, who hopes their experiences will lead to honest discussion in school forums and help break down barriers.

With the training sessions behind them, the students from Montour and Brashear, along with groups from Holy Family Academy, Pittsburgh CAPA, Pittsburgh Westinghouse and South Fayette high schools, are now back on their own campuses working on issues ranging from food insecurity to racism and other forms of prejudice.

"I was so impressed by what I saw the students doing at LUMA. These young people were so inspirational. The ways in which they expressed themselves and used their voices brought tears to my eyes," says Montour teacher Hester.

As a next step, students and their adult allies will be invited to apply for funding to implement their ideas and change their worlds.

Kitty Julian | senior communications officer

↑
Montour student Eric Macadangdang brainstorms ways to encourage mental health awareness and reduce stigma.

← The Fleischners are pictured with Charles "Teenie" Harris's 1967 photograph "Elsie Hillman talking to man" at Carnegie Museum of Art.



BUILDING EQUITY

Donors foster access and opportunity in the arts

Donors Dawn and Christopher Fleischner nurture diversity in arts and education through their donor-advised fund and board service.

THEIRS IS A QUINTESSENTIAL Pittsburgh boomerang story. Initially drawn back from Southern California to be closer to his parents, Christopher and Dawn Fleischner soon found themselves feeling very much at home, especially in the city's arts and cultural community. When the couple found themselves seated next to Carnegie Museum of Art Director Lynn Zelevansky at an event, they realized they had all relocated to Pittsburgh from Los Angeles at the same time.

"Pittsburgh has this way of just welcoming you in," says Dawn. "It was immediately apparent that we could jump in feet first and get engaged in the things we care about much more easily than in Los Angeles."

Intellectually curious people, the Fleischners began soaking up the city's arts and cultural offerings as a way to get reacquainted with Christopher's hometown. As welcoming as the city was, the two believe the city's arts community must become more inclusive. As co-owners of CalWest Educators Placement, they have dedicated their professional lives to recruiting diverse faculty and leaders for independent schools to ensure that students see themselves in their teachers and administrators.

"Embracing diversity means pushing ourselves to look beyond what the conventional canon has taught us," says Dawn. Arts organizations, the Fleischners believe, have the opportunity to do more — much more — to reflect the diversity of the city in programming, staffing and board leadership. They're dedicating their donor-advised fund at The Pittsburgh Foundation to supporting equity and inclusion in the arts and education.

They initially learned of the Foundation from Christopher's parents who already had a fund here. As they got to know the Foundation's staff, they became increasingly enthusiastic about the possibility of starting their own philanthropy.

"We had access to outstanding programming and to organizations that were new to us. It is really a virtuous circle of involvement," says Christopher.

They attended Center for Philanthropy

events as an intergenerational family activity that included children, Andrew, 12, and Katharine, 14, who have made a year-end tradition of picking projects from the Foundation's annual Wish Book to support with their grandparents, Hans and Leslie Fleischner.

Volunteer service is also part of the family's philanthropic mix. Christopher joined the Museum of Art Board, where he's been a champion for opportunities to share and support the Teenie Harris photography collection. Dawn recently signed on for her second term on the board of Pittsburgh Ballet Theatre, which has a commitment to equity and diversity.

"Pittsburgh Ballet Theatre is working to lower the barrier of entry for dancers of color in its school, graduate programs and on staff. The ballet is dedicated to the idea that the company and audience must reflect the population of the community because it's our ballet and our city," she says.

Through Operation Better Block, they've also supported author and activist Kilolo Luckett's "Naomi Sims Project" and the "By Any Means" contemporary art summit, both of which focus on African American artistic experience and identity. They've also given to the School 2 Career Program of Oakland Planning and Development Corporation, which offers high school students mentorships and paid internships to guide them toward college and careers.

As their fund grows, the Fleischners intend to extend their commitment to educational organizations that address intergenerational poverty and basic needs, such as fresh food in communities that lack farmers markets or grocery stores. Their advice to others considering starting a fund: Don't put it off. Instead, start small and grow along with your fund.

"The Pittsburgh Foundation teaches you how to be philanthropically engaged so that later, when you have more resources, you've learned how to be engaged in the community," says Dawn.

Kitty Julian



QUIET DISTINCTION

ANDREW KUREMSKY'S LIFE was one of service. As an officer in the Fairfax County (Va.) Police Department for only two years, Kuremsky, 25, was decorated for heroics, but he was not one to wear the honor on his sleeve. His way, friends and family members say, was to do his work quietly, in the background.

It wasn't until he and his girlfriend, Melanie Wetzel, lost their lives in a car accident in Somerset County last August that the distinct nature of his life of service became clear.

"Andrew saw life as being full," says his mother, Jean Ahwesh. "He had acceptance, order and clarity. At Andrew's home, there was always a feast with family and friends. He was making his house into a home. There were no strangers, only friends."

After his sudden passing, his mother, along with father, Larry, and brother, Connor,

Fund empowers character and community service builders

established the Andrew K. Kuremsky Fund. Distributions are used to support five causes close to Kuremsky's heart: The Boy Scouts of America, Laurel Highlands Council; Police Canine Unit of Fairfax County (Va.) Police Department; the Law Enforcement Explorers program of Fauquier County, Va.; scholarship assistance for criminal justice majors at the Pennsylvania State University; Franklin Park Volunteer Fire Company, Sewickley, Pa.

"Our family's hopes for the fund are to in some small way carry on Andrew's work," Ahwesh says. "By doing so, we honor him. Because of his values of service above self, faith, family and hope, he made a difference everywhere he went, personally and professionally. He touched many people along the way, and he will be sorely missed."

Andrew Kuremsky and his mother, Jean, outside the Fairfax Co. (Va.) Police Department, where he was an officer.

Raised in Wexford, Allegheny County, Kuremsky's myriad skills were obvious at a young age. Kuremsky didn't just mow lawns and shovel driveways; he made his entrepreneurship into an LLC. Kuremsky didn't just join the Boy Scouts; he became an Eagle Scout with the most involved project in the troop's history. He didn't just save his money in the bank; he created an investment portfolio at the age of 12. He also volunteered with Wexford's Orchard Hill Church, and two years later, as a precocious teenager, he joined the Franklin Park Volunteer Fire Company.

"He was the oil in the machinery. He made things go. That's who Andrew was," Glenn Sinko, Kuremsky's Boy Scout leader, told the Pittsburgh Tribune-Review.

"Andrew was always a curious little boy who developed into a compassionate, hardworking and respectful young man. He woke up every day with a purpose and a plan," Ahwesh says. "He was always the one who solved problems and helped around our home. Maintaining our automobiles, lighting, lawnmowers; [doing] household repairs and renovations; he was the family videographer, photographer, landscaper, to name a few."

It's difficult for those who knew Kuremsky best to pinpoint what led him to develop such maturity at a young age, but the effect of it was remarkable. As a student in the Criminal Justice Program at Penn State, he was a regular on the Dean's List. As a cadet in the Fairfax County (Va.), Criminal Justice Academy, he graduated at the top of his class.

"Giving back through service and philanthropy is part of what our family does," Ahwesh says. "Andrew always thought beyond the moment and acted in the best interests of everyone and beyond himself. He was a quiet leader, a visionary with a spiritual grounding.

"One of our family's favorite lessons, one that we learned at church, is that, at the end of the day, a person's values can be summed up by how that person spends time and money. Andrew's time — both on and off the job — was spent helping others, and his money was spent building a future for his family and the charities where he volunteered."



THE NEW MOTHER SHIP FOR COMMUNICATIONS

THE FOUNDATION RELAUNCHED its website in November with the goal of creating a better user experience for its visitors. Staff, along with a professional designer and programmer, have delivered a bolder, more modern design, improved search functionality and more useful content.

Early user experience indicates that **PittsburghFoundation.org** is an engaging digital hub of Foundation news and resources.

The new website is designed to be responsive on mobile devices as well as computer screens. On any platform, users can navigate quickly to locate grant application materials, information on how to start a fund and a list of existing funds to support. The site also integrates compelling multimedia, pertinent Foundation information and history to provide users a productive online experience.

Foundation President and CEO Maxwell King says transparency, scholarship search functionality and storytelling are more significant on the new website.

"The website is the only global communication that the Foundation produces," says King. "Now more than ever, it is incumbent upon philanthropy to include the people we serve and our partners on the most important platform for communicating what we do."

Leading and Learning: Michelle McMurray named ABFE Fellow

The Association of Black Foundation Executives has named The Pittsburgh Foundation's Senior Program Officer for Health and Human Services, **MICHELLE MCMURRAY**, to its Connecting Leaders Fellowship Program. Her yearlong appointment began in September. The Fellowship Program pairs talented leaders with an executive coach to build and fine-tune skills that will lead to philanthropy in African American communities that is more effective and sustainable. The Fellowship started with a weeklong leadership summit in Oakland, Calif., and will end following the completion of an innovative community-based research project or volunteer work focused on becoming better change agents within their institutions.



That mission aligns directly with McMurray's personal mission since arriving at the Foundation two and a half years ago.

"I consider it to be a call to action for myself, personally, which is why I'm so grateful for this opportunity. It creates space for me to think about what actions I might take individually, but also in my Foundation work, to have a more positive impact on communities that have not seen investment for a very long time."

That investment includes providing access to affordable housing, leveraging the strengths of church congregations, nonprofit organizations and civic groups in communities, and supporting neighborhood leaders who want to make a difference. These are tenets of the Foundation's 100 Percent Pittsburgh organizing principle, and the Small and Mighty grants program developed

from it that seeks to meet the needs of smaller grass-roots organizations, which McMurray plays a vital role in supporting.

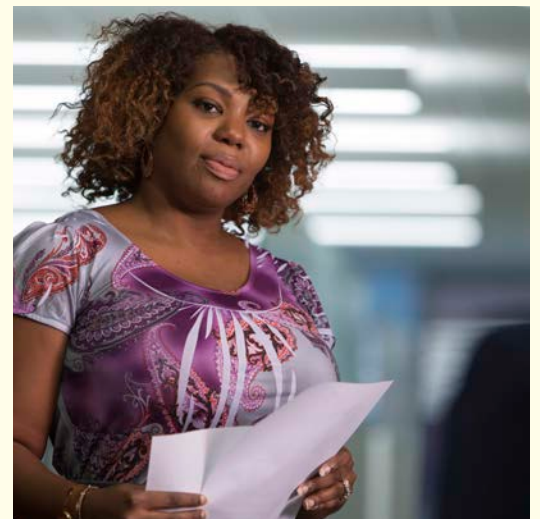
"Michelle brings an extraordinary intellect and deep compassion to her work [helping] organizations that seek to meet the basic needs of those who experience the effects of poverty in their lives," says Senior Vice President for Program and Policy Jeanne Pearlman. "She is committed to the Foundation's efforts to address institutional racism and to engage young people in organizing for systemic changes in those systems that disproportionately impact people of color."

Validating that "committed" assessment, McMurray says she asks herself each day "What can I do today that will advance opportunities for individuals who are least connected? How do I use my position, my privilege and my passion to advance change? I am honored to work in a place that provides me with space and an opportunity to do that."

Making Her Mark: Charmelle Jackson named "Woman of Excellence"

Human Resources Manager **CHARMELLE JACKSON** will be ringing in the new year in style as a distinguished honoree at The New Pittsburgh Courier's Women of Excellence Luncheon, Jan. 7 at the Wyndham Grand Hotel, Downtown. The event "recognizes African American women who are leaving lasting marks by making great strides in their professions and positively impacting their communities."

"I was surprised, shocked, honored," Jackson says. "It will be among the greatest experiences of my career and professional development."



Jackson provides human resources, payroll and benefits support to the Foundation and its network of organizations — the Forbes Funds, Pittsburgh Promise and Neighborhood Allies. Vice President of Finance and Investments Jonathan Brelsford credits Jackson with identifying and resolving benefits issues that had remained outstanding for several years. She's also managed the hiring process for 15 new staff members.

"The Foundation and its operating supporting organizations are always looking for talented individuals," Brelsford says. "Charmelle has been instrumental in helping the organization clarify the roles and identify great candidates."

Growing up in the Larimer neighborhood of Pittsburgh's East End, and now residing in the Penn Hills area, Jackson's role in supporting staffs in their workplaces that, in turn, enable them to be more effective in philanthropy gives her a sense of pride and fulfillment.

"What we do — the people that I work with — we're about what is going on in the community and we want to make positive social change," Jackson says. "It's rewarding being able to see some of those changes happen: they start as ideas and then, as they go through more development, great things happen."

Finding the Proper Balance: Foundation mission, quality of life draws Hezel back to Pittsburgh

During her time working for the U.S. Embassy in Stockholm, Sweden, **ASHLEY HEZEL** learned the Swedish word *lagom*. It's one of many in that language that lack a direct English translation. The basic translation: "just the right amount." It's an apt description for the lifestyle preferred by most Swedes: no excess; just enough of what is necessary for proper balance.

Lagom also is Hezel's description for what brought her back to Pittsburgh and to a key position at the Foundation. A Nashville native, she fell in love with the city while earning a master's in public and nonprofit management from 2006 to 2009 at the University of Pittsburgh's Graduate School of Public and International Affairs. She appreciated what Pittsburgh offers in terms of work-life balance.

"Pittsburgh is in a unique place," Hezel says. "It's a bit of an underdog from the boom industrial years, and underdogs have heart. Although Pittsburgh is topping charts from food



scenes to livability, it's that underdog heart that causes us to pause, look around and make sure the renaissance is working for everyone. The Pittsburgh Foundation is central to this message, and choosing to join an organization that is focused on 100 percent of the population is true to my public-spirited ethos and also the life lessons I learned in Sweden."

After five years in Stockholm, Hezel and her family returned to Pittsburgh. She is now grants manager for the Foundation.

"As I began looking for work in Pittsburgh, I realized that I was a nonprofit generalist in working for a nonprofit mission," Hezel says. "Throughout my career, both volunteer and professional, I had gotten behind many wonderful yet very different missions. At The Pittsburgh Foundation, I don't have to choose one mission; our mission encompasses so many worthy needs right within our own community."

That job doctrine is Ashley's *lagom*: just the right amount of many things. As the grants manager, Hezel is the primary conduit linking the Program Department, Development & Donor Services and grantees to ensure compliance with federal regulations and manage processes to the satisfaction of all parties.

"[Ashley] has brought experience as a grantee as well as her bright personality to a complex and demanding job," says Vice President of Finance and Investments Jonathan Brelsford.

Since stepping into the job in September, Hezel has already worked across departmental teams to improve the scholarship search function on the Foundation's new website.

Christian Pelusi



CHARITABLE GIVING BY DESIGN

ADVISOR
PROFILE

Elizabeth Genter, Schenley Capital



Advisor Elizabeth Genter of Schenley Capital uses her donor-advised fund to support education.

SCHENLEY CAPITAL'S new offices in Sewickley are bright, open and contemporary, with every detail curated to put people at ease. That intentionality aligns with Schenley Capital President Elizabeth Genter's approach to financial advising. "Talking about money can be nerve-racking for clients," she says. "Our space was designed to help people feel comfortable. Before we ever talk about numbers and projections, we listen and learn about their goals and challenges."

Publications like Barron's are taking note. Genter has been invited to speak at the Barron's Top Independent Women's Advisor Summit about the importance of design and technology to successful, client-focused financial planning.

Genter's focus on clients' needs began when she was a wealth manager for a large New York City-based firm. She soaked in the educational opportunities and made sure she was always the most prepared and inquisitive person in the room. While the training was exceptional, the vehicles available to clients were limited to the firm's own products. She decided to strike her own path. After earning her certificate in financial planning from Duquesne University, she successfully registered with the FTC as an independent investment advisor. Genter now collaborates with accountants and estate planners to deliver comprehensive, well-rounded, customized financial plans.

The combination of expertise and collaboration is what drives Genter to refer clients to The Pittsburgh Foundation, and why she established a donor-advised fund of her own in 2000.

"I commend the Foundation for giving families the ability to choose their own advisors and for its progressive approach to investing. That openness to allowing advisors to refer and also manage the money is critical because it keeps clients engaged across generations," she says.

She also appreciates the ease of administration. "The Foundation does all the gifting, reporting and record keeping, and does it beautifully," she says. Genter also relies on the Foundation's expertise for her own fund as well as for her clients.

"I'm in the process now of working with a family to set up a fund at the Foundation. My clients are very interested in supporting missionary work in Africa and Haiti. The Pittsburgh Foundation's staff has offered additional recommendations for grants. There is great synergy between my clients and the Foundation," says Genter.

When asked what causes figure most in her own philanthropy, Genter responds that she invests in education. "When people strive to be better educated, they open up more choices for themselves. That uplifts our society as a whole."

Kitty Julian

NEW INSTRUCTIONS FOR STOCK TRANSFERS, MUTUAL FUND DONATIONS AND CASH WIRES

AS WE HEAD INTO WINTER, please note an important change at The Pittsburgh Foundation. In order to increase efficiency and streamline stock transfers, mutual fund donations and cash wires for donors invested in Legacy Funds and/or American Funds, we have created a new account to receive gifts.

As a result, the instructions for adding to a fund at the Foundation also have changed. In order to prevent future gifts from being rejected, please contact the Foundation's Development and Donor Services Department at 412-394-4294 prior to transferring any assets.

Listed here are instructions for delivering securities, stock and/or cash into the Foundation's new gift account. These should be used from this point forward, rather than the previous year's instructions, which called for transferring gifts to Morgan Stanley or the BNY Mellon account.

Please don't hesitate to contact a donor services representative with any questions or concerns. Please also note that the procedure for checks and credit card gifts remains the same.

DONORS:

To wire stock/DTF eligible securities:

Contact a donor services representative.
DTC# 0443

Account Name: Pershing LLC

For Credit to Account Number: N7M001723

Client Account Name: The Pittsburgh Foundation

Year-end deadline: Friday, Dec. 30 at 5 p.m.

To wire cash:

Contact a donor services representative.

ABA 021000018

Account Name: Pershing LLC

Account Number: 890-051238-5

For Further Credit: N7M001723

The Pittsburgh Foundation

Year-end deadline: Friday, Dec. 30 at 5 p.m.

For mutual funds and other securities:

Contact a donor services representative.

For checks:

Deliver to:

Arlene Sample

The Pittsburgh Foundation

5 PPG Place, Ste. 250

Pittsburgh, Pa. 15222

List the fund name in the memo.

Gifts may also be made online at

pittsburghfoundation.org/donate-online



Pittsburgh Brashear junior Pabitra Gautam is training to fight discrimination and increase understanding. See page 6 for more.

Please do not hesitate to contact The Pittsburgh Foundation if you are interested in establishing a new fund. The Foundation's office is open through Dec. 30, and funds can be set up in 24 hours or less.

For current donors, please contact your donor services representative prior to making a gift. Please refer to the following dates for year-end giving to your fund:

Stock/cash transfers must be received in the Foundation's account by Friday, Dec. 30, at 5 p.m. Please make the Foundation aware of your stock gift ahead of the transfer.

Checks must be postmarked by Saturday, Dec. 31.

The Foundation's office will be closed on Friday, Dec. 23, and Monday, Dec. 26.

The office will be open until 3 p.m. on Friday, Dec. 30.

NEW FUNDS October 1, 2016 – December 1, 2016

Andrew K. Kuremsky Fund
ABLOG 2016 Fund
Jeanne Starr Fund
Leonard Wiegand Fund
Valent Family Charitable Fund
Myers Legacy Fund
Mary Dvorsky Family Fund
Raj and Barb Sawhney Family Fund
Elizabeth S. Stern Fund
Reverend Ralph D. Jordan Center of Light Memorial Fund
Center of Light Community Support Fund
Errol & Enid Miller Fund
Three Rivers Heritage Stewardship Fund

DESIGN: LANDESBURG DESIGN
PHOTOGRAPHY: JOSHUA FRANZOS
PRINTING: BROUDY PRINTING
ADDITIONAL PHOTOGRAPHY: JEAN AHWESH, KELLY PERKOVICH OF PITTSBURGH BALLET THEATRE, MARCY HOLQUIST AND ALEX JONES FOR SCHENLEY CAPITAL
EDITORIAL STAFF: KITTY JULIAN, MAXWELL KING, DOUG ROOT, CHRISTIAN PELUSI

DEVELOPMENT & DONOR SERVICES STAFF

Yvonne Maher, Senior Vice President for Development and Donor Services
mahery@pghfdn.org | 412.394.2644

Lindsay Aroesty, Director of Donor Services, Planned Giving Specialist
aroestyl@pghfdn.org | 412.394.2606

Caleb Crousey, The Community Foundation of Westmoreland County, Development and Program Officer
ccrousey@cfwestmoreland.org | 724.836.4400

Kate McKenzie, Senior Development Officer
mckenziek@pghfdn.org | 412.394.2627

Ariene Sample, Administrative Assistant
samplea@pghfdn.org | 412.394.2640

Lisa Steed, Development and Donor Services Assistant
steedl@pghfdn.org | 412.394.2630

Neil Straub, Business Process Associate
straubn@pghfdn.org | 412.394.2624

Christy Stuber, Donor Services Officer
stuberck@pghfdn.org | 412.394.2646

Kelly Uranker, Director, Center for Philanthropy
uranker@pghfdn.org | 412.394.2604

Erin Wagner, Center for Philanthropy Associate
wagnere@pghfdn.org | 412.394.2654

Trista Yerks, Scholarship Associate
yerkst@pghfdn.org | 412.394.2653

Jennie Zioncheck, Director of Development
zioncheckj@pghfdn.org | 412.394.2621