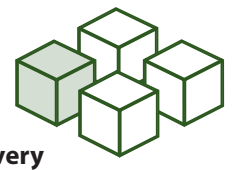


Giving Game Plan



John and Mary Smith: Smith Family Foundation

CAPSULE DATA

Purpose Statement:

The foundation exists to provide resources to meet the physical and emotional needs of disadvantaged people in Texas and worldwide.

Desired Legacy:

John and Mary Smith will be remembered as wise stewards of their resources. They maximized the impact of their generosity by carefully selecting effective organizations and by transferring their values to their children and grandchildren.

Giving Goals and Targets:

2021 Target	\$ 1,500,000
10-Year Goal	\$ 20,000,000
Legacy Goal	\$ 35,000,000

Smith Family Foundation

14319 Highview Ln.
Dallas, TX 75225

ph 555.441.1123

fax 555.334.5512

www.smithfamilyfdn.org

Contact: Mary Smith

Year Founded: 2002

Geographic Focus:

- Local/Regional (75%)
- China (15%)
- Latin America (10%)

Meeting Frequency: Quarterly

Annual Board Meeting: August

Disbursements: Semi-Annual

Gift Size (max): \$1,500,000

Gift Size (min): \$2,000

FY20 Assets: \$7,360,000

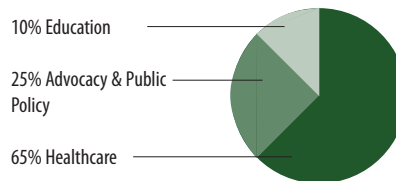
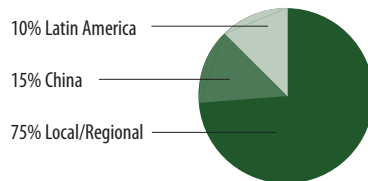
FY20 Total Giving: \$1,509,850

FY20 Expenses: \$77,520

Total Orgs Supported 2020: 53

EIN: 351-87-2803

Target Category Allocations:



Target Geographic Allocations:

The Smith Family Foundation actively supports local charities in Texas that provide guidance and aid to the sick. In both the United States and worldwide, education is an important theme in their generosity. In addition, the foundation provides ongoing funding for organizations in China and Latin America, providing for their physical and emotional needs in a nurturing environment.

UNITED STATES

- Healthcare
- Education
- Advocacy & Public Policy

LATIN AMERICA

- Humanitarian
- Evangelism/ Discipleship
- Community Development



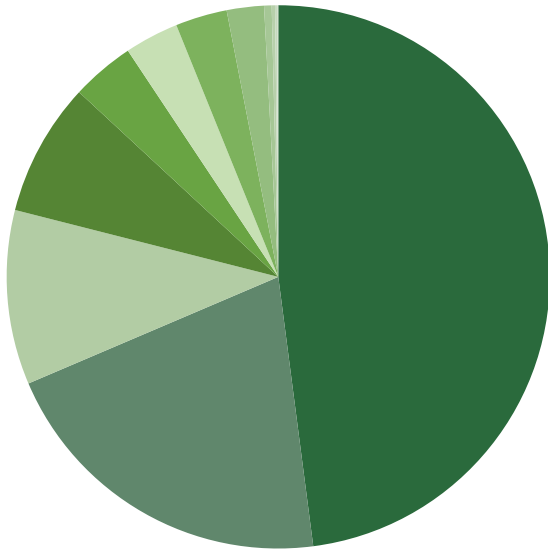
CHINA

- Humanitarian
- Orphan Care

Multi-Year Giving Analysis

John and Mary Smith - Smith Family Foundation

Total Giving by Program Area: A review of your total giving by program area, 2015 - 2020



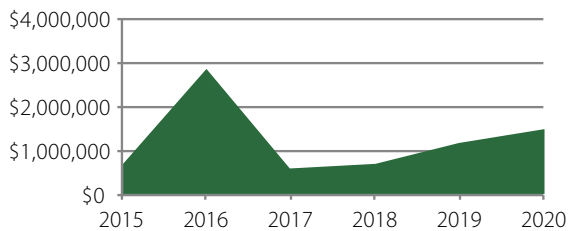
Area	Allotment	# of Orgs	Total Giving
Healthcare	48%	3	3,641,994
Advocacy/Public Policy	21%	6	1,567,775
Education	10%	8	788,481
Humanitarian/Mercy Ministry	8%	10	602,965
Environment/Animals	4%	3	285,750
Personal/Social Development	3%	10	244,200
Adoption/Foster/Orphan Care	2%	5	233,650
Evangelism/Discipleship	0%	4	168,066
Community Development	0%	2	34,000
Arts/Media	0%	3	15,100
Social Justice	0%	3	8,400
Support Services	0%	3	6,050
Total		60	\$7,596,431

Top Gift Recipients: Organizations that received the highest proportion of your total giving, 2015 - 2020

	Total Gifts	Impact	Satisfaction
MD Anderson Cancer Center	\$2,432,734		H M L
Cook Children's Medical Center	\$1,000,000		H M L
Texas Christian University	\$ 731,111		H M L
International Justice Mission	\$ 579,000		H M L
Texas Public Policy Foundation	\$ 564,273		H M L
Liberty Institute	\$ 286,000		H M L
Samaritan's Purse	\$ 275,000		H M L
Alzheimer's Association	\$ 209,260		H M L
Show Hope	\$ 173,200		H M L
Fort Worth Zoo	\$ 150,000		H M L
Dallas Arboretum	\$ 130,000		H M L
Good News Jail & Prison Ministries	\$ 126,500		H M L

Overall Giving Trends: Overview of how your giving has changed, 2015 - 2020

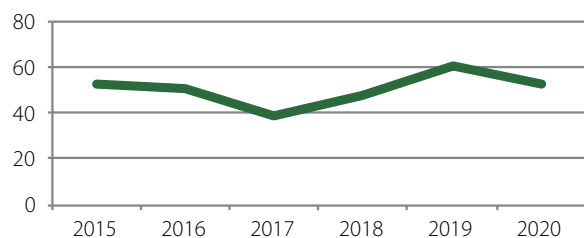
Total Gifts, 2015-2020



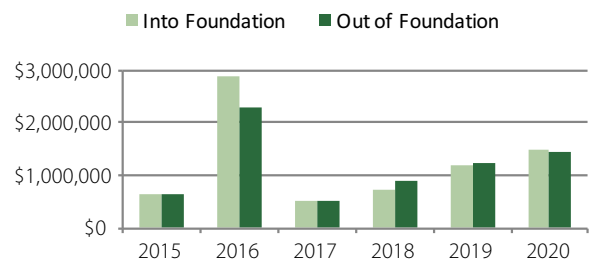
Year Total Gifts Orgs Supported

Year	Total Gifts	Orgs Supported
2015	\$ 692,750	53
2016	\$ 2,895,253	51
2017	\$ 577,615	39
2018	\$ 715,537	48
2019	\$ 1,205,426	60
2020	\$ 1,509,850	53

Number of Organizations Supported Annually



Foundation Activity



Proprietary & Confidential

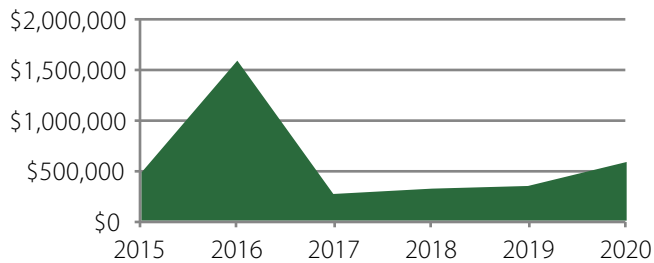
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Multi-Year Giving Analysis

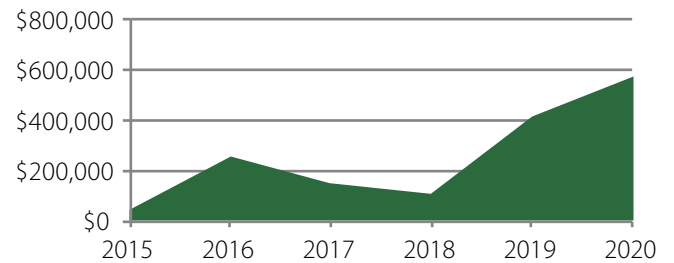
John and Mary Smith - Smith Family Foundation

Category Trends: Overview of how your giving has changed in each category, 2015-2020

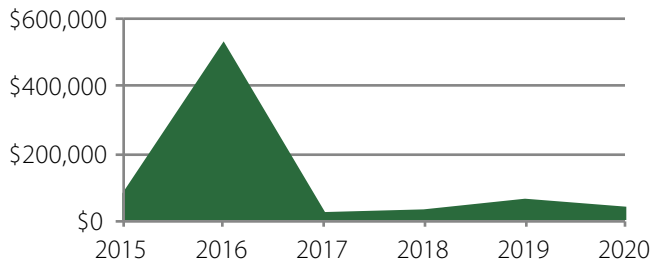
Healthcare: \$3,641,994



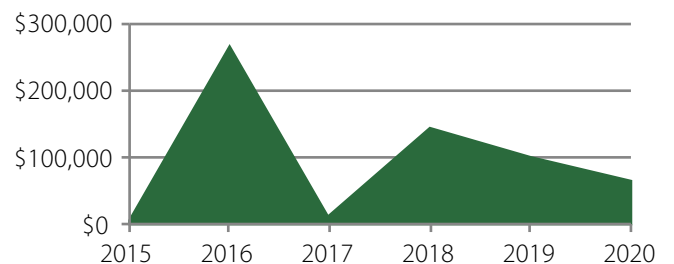
Advocacy & Public Policy: \$1,567,775



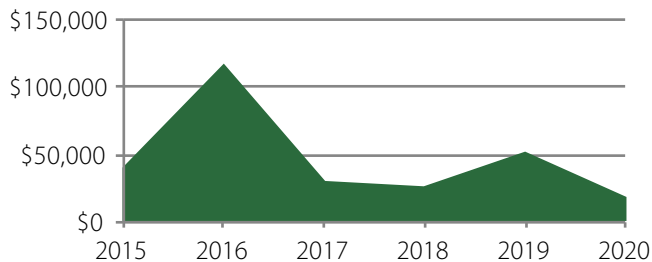
Education: \$788,481



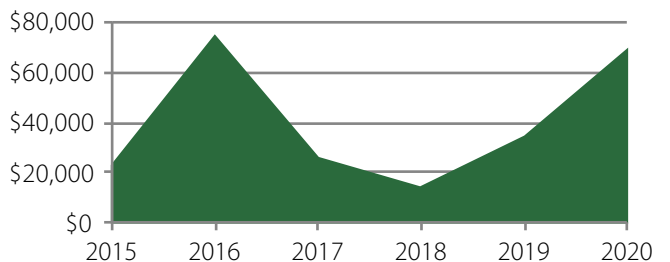
Humanitarian/Mercy Ministry: \$602,965



Environment/Animals: \$285,750



Personal/Social Development: \$244,200



Overall Giving Trends: Overview of giving by program area, 2015 - 2020

	2015	2016	2017	2018	2019	2020	Total
Healthcare	473,950	1,606,075	269,800	333,750	359,000	599,419	3,641,994
Advocacy & Public Policy	50,400	260,205	154,990	106,925	417,732	577,523	1,567,775
Education	85,000	534,898	28,250	35,142	65,578	39,613	788,481
Humanitarian/Mercy Ministry	7,050	267,200	13,750	145,170	102,800	66,995	602,965
Environment/Animals	39,500	117,750	30,100	27,150	51,750	19,500	285,750
Personal/Social Development	23,400	75,400	26,000	15,150	34,750	69,500	244,200
Adoption/Foster/Orphan Care	2,700	3,000	27,700	25,250	100,000	75,000	233,650
Evangelism/Discipleship	0	30,250	25,000	25,000	36,816	51,000	168,066
Community Development	0	0	0	500	23,500	10,000	34,000
Arts/Media	3,000	100	2,000	1,000	8,000	1,000	15,100
Social Justice	7,750	125	25	500	0	0	8,400
Support Services	0	250	0	0	5,500	300	6,050
Total	\$ 692,750	\$ 2,895,253	\$ 577,615	\$ 715,537	\$ 1,205,426	\$1,509,850	\$ 7,596,431

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