

SHUSWAP COMMUNITY FOUNDATION
Market Value as at March 31, 2017
ENDOWMENT FUNDS

Discretionary	
Board Discretion (no limitations to Board)	
Albert and Muriel Spencley Endowment	21,537
Brooke, Downs, Vennard LLP Endowment*	10,641
Brooke, Jackson, Downs Endowment	20,655
Catherine and Joseph Shay Memorial Endowment	76,876
Chapman Family Endowment*	13,634
Community Fund	381,537
Dave Neale Memorial and Trinity Neale Endowment*	12,061
David Wood and Jean Bleakley Endowment*	10,927
Derkaz/Derby Family Endowment	41,437
Don and Irene Rogers Endowment*	8,769
Doreen McCaig Memorial Endowment	104,220
Doug and Donna Adams Family Endowment	29,773
Dr. Tess Trueman Endowment	2,366
Earl and Muriel MacKenzie Family Endowment	16,791
Founders	88,699
Fred and Alice Duck Endowment*	10,343
Gordon and Bev Marshall Family Endowment	21,679
Gordon Priestman Memorial Endowment*	10,552
Harry, Thelma and Patricia May Endowment*	9,614
Higgins Family Endowment	42,864
Howard Johnston Memorial Endowment*	10,562
Ian Duncan and Maureen Stickney Endowment*	10,629
Louise and Sieg Silver Memorial Endowment*	2,069
Lynda Nicholson, Allen Ferguson Endowment*	10,653
Marian and Ralph Segreto Endowment	45,685
Nels and Nellie Latta Memorial Endowment*	8,275
Nina Dickins Family Endowment	21,233
Pat and Peter Cummings/George & Eva Kassa/Patti & Bryan Kassa	22,476
Reid/Wright Families Endowment	13,007
Sheldon and Karen Pukas Family Endowment*	18,359
Tom and Elsie Brighthouse Family Endowment	28,356
Ulrick and Margarete Schoene Family Endowment*	14,144
White/Johnson Endowment*	10,343

Board Discretion - Donor Preference	
Browne Johnson Legacy	86,488
Enid Finn Memorial	15,203
Gerry and Rita Chu Family Endowment	22,680
Gertrude and Ludwig Klein Memorial	80,597
Lloyd and Dorothy Askew Family Endowment	248,141
Margot Hewitt, Dr. Melany Dyer Endowment	24,939
Molly Bell Endowment	11,584
Paul and Jane Burrows Endowment	34,128
Rick and Linda Hirtle Family Endowment	12,155
Rosemarie's Fund	25,238
Shuswap Coordinating Training Society Endowment	59,677
Tom Pugh Memorial	10,694
Turner Orchards Endowment	21,250
Wendy and Rod Charlebois Endowment	10,817
Youth Endowment	16,926

Board Discretion - Donor Limitations	
Aileen Gentles Memorial Endowment	12,517
Anonymous Eagle Valley Seniors Endowment	14,315
Bill and Mary Douhaniuk Endowment	69,492
Bob and Marlene Robertson Family Endowment	12,394
C. Norman Barber Endowment	70,009
Carson/Murray Endowment	10,343
Dr. Lee and Jos Penner Family Endowment	1,690
Eagle Valley Communities Endowment	12,609
Edna and Dan MacQuarrie Family Endowment	17,853
Ev Painter Endowment	28,871
Garry Locke Memorial	7,375
Gary W. Carder Endowment Fund	1,035
Geoff and Judith Benson Family Endowment	243,169
Ian and Wendy Clay Endowment	11,152
Jennifer Phillips Memorial	82,662
Joe and Bobbi Johnson Schools Legacy	24,504
John and Ingrid Monk Endowment	132,144
Kylo Family Endowment	10,577
Landers Family Legacy	10,618
Letham Family Endowment	15,955
Maureen Brass Memorial	3,118
Maurice Gillis Memorial Endowment	12,001
Mickey Petersen Endowment	3,510
Paul and Elvi Pukas Family Endowment	50,693
Potter/Edgell Family Endowment	37,215
Robin Jackson Environmental Endowment	21,822
Rod Bailey Endowment	17,487
SASCU Community Endowment	112,032
SASCU Youth Endowment	20,704
Seniors Project	33,318
Sorrento Lions Club - Catherine Dilworth Memorial Endowment	114,627
Steve Guidone and Jaki Greenhough Endowment	1,052
Wainwright-Mobley Memorial	224,960

Board Discretion: - Memorial Walkway Fund	
McGuire Lake Memorial Walkway	53,761

Total Discretionary Funds	\$3,326,867
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Non-Discretionary and Agency Funds	
Non Discretionary Funds	
Al Neale Bursary	166,445
Beryl Herdan and Al Neale Endowment (CMHA)	23,310
Bill and Mary Douhaniuk Memorial	37,479
Bill and Peggy Kernaghan Family Endowment	1,970
Bill MacDonald Memorial	16,987
Braby Family Endowment	10,761
Brad Jackson Scholarship	23,434
Bruce Hall Memorial Endowment	2,894
Canadian Mental Health Association - Shuswap/Revelstoke Branch	23,298
Centennial Reunion Scholarship	8,385
Clara Anderson Endowment	5,462
Class '77 - David MacKay Memorial Endowment	9,594
David John Stratton Memorial Bursary	15,780
Dearing Family Endowment	23,931
Denis Marshall and Geoff Leech Memorial Endowment	10,000
Dorothy Longdo Memorial	142,467
Doug and Donna Adams Museum Endowment	1,142
Douglas Burkitt Memorial	15,401
Elisabeth Thomi Endowment	1,496,911
Eve and Christopher Wright Scholarship	17,141
Fowler/Gomme Family Endowment	27,776
Frank and Rita Smuin Memorial Bursary	25,537
Gordon Mackie Endowment	1,034
Henderson Award in International Development	68,919
Jack and Edith Stead Endowment	53,352
Jack and Edith Stead Hospital Endowment	11,340
Janet Pattinson - Shuswap Naturalist Club Bursary	29,438
Lisa Rolland Children's Literacy	23,511
Lloyd and Joy Johnston Family Endowment	149,932
Loyola Elliott Bursary	8,062
Marie Manson Memorial Art Award	42,097
Morris Bursary Fund for Excellence in Mathematics	58,070
Nayki/Greer Family Endowment	100,543
Nick and Marilyn Brown Family	31,366
Porteous/Mullen Bursary Endowment	35,432
Ready Family Endowment	39,534
Salmon Arm Kinsmen and Kinette Fund	54,345
Salmon Arm Secondary Athletic Endowment	38,706
Sansom Family Endowment Fund	3,105
Shane Gerner Memorial Endowment	21,100
Shuswap Branch, B.C.S.P.C.A. Endowment	117,920
Shuswap Volunteer Firemen's Association - Cody Davies Memorial Bursary	18,201
Steve Heal Memorial Scholarship	18,798
Susan Latimer Bursary	1,266
Tom Brush Memorial Scholarship	17,880
Tomas Idzan Memorial Bursary	16,142
Walter Ellaschuk Memorial Bursary	39,297
Wayne Williamson Memorial	7,074

Total Non-Discretionary Funds	\$3,112,569
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Agency Funds	
Administration Endowment	87,508
Anglican Parish of Salmon Arm - Sicamous Endowment	30,419
City of Salmon Arm Endowment	234,700
Seniors Resource Centre - Fletcher Park Endowment	27,426
North Okanagan-Shuswap School District Endowment	84,570
Okanagan College Foundation	157,805
Okanagan Regional Library (Shuswap) Endowment	5,524
Royal Canadian Air Cadet 222 Shuswap Squadron Endowment	3,461
SABNES Endowment	15,169
SAFE Society Endowment	16,556
Salmon Arm College Scholarship Trust - George and Nancy Clark	122,595
Salmon Arm College Scholarship Trust - Len O'Neill Memorial	105,778
Salmon Arm College Scholarship Trust - Vicki Hitcher Memorial	94,147
Salmon Arm Museum and Heritage Association - Peterson Family	78,501
Salmon Arm Museum and Heritage Association Endowment	181,991
Shuswap Art Gallery Association Endowment	471,401
Shuswap District Arts Council Endowment	60,219
Shuswap District Arts Council Endowment - Blair Borden Memorial	39,179
Shuswap District Arts Council Endowment - T.O.N.A.C.	8,278
Shuswap Hospice Society Endowment	48,913
Shuswap Hospital Foundation Endowment	37,326
Shuswap Theatre Society Endowment	34,826
Sorrento and Area Community Health Centre	14,959
The Shuswap Trail Legacy Fund	10,742

Total Agency Funds	\$1,971,993
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Total Discretionary Funds	\$3,326,867
Total Non-Discretionary Funds	\$3,112,569
Total Agency Funds	\$1,971,993

Total Fund Balances	\$8,411,429
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