INVESTMENT OBJECTIVE

Provide a relatively stable, inflation adjusted, annual contribution (if approved by the committee) to the Vestry to support the Church's mission in perpetuity.

GRANTS TO THE CHURCH

Annually, if the fund balance is above $250,000, the Endowment Committee makes a grant to the church's Operating Fund to be used at the Vestry's discretion. Grants are not issued if the fund balance is at or below $250,000. The grant value is required to be between 4% and 7% of the average fund balance.

When grants are made, the Vestry determines the best use of the funds. If a grant is awarded, the preceding End of Year Balance is used to determine the grant amount; the grant is typically provided to the church during the first quarter of the year (e.g., 2023 EOY balance used to determine 2024 grant amount which is provided to the church in Q1 of 2024.

GIFTS AND DONATIONS

Gifts and donations may be cash, marketable securities, insurance policies, and non-cash assets.

Gift amounts are never disclosed publicly. Anonymous contributions are also welcome and confidentiality maintained.

To donate now, use this QR code and select "Give to Endowment Fund". Thank you.

FUND OVERSIGHT AND MANAGEMENT

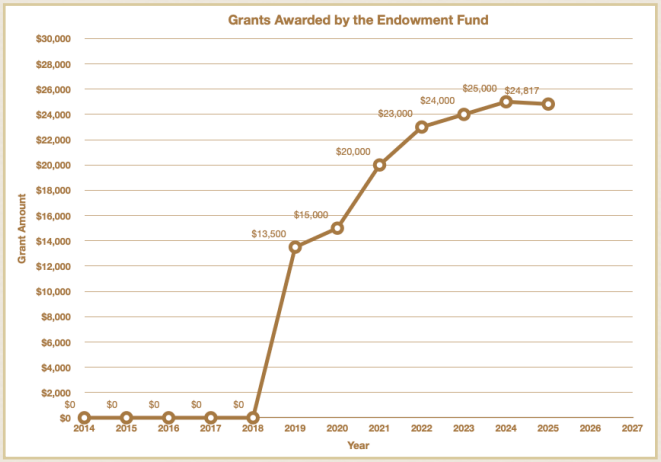
On behalf of the church, the Endowment Committee oversees the Fund in conjunction with the Vestry.

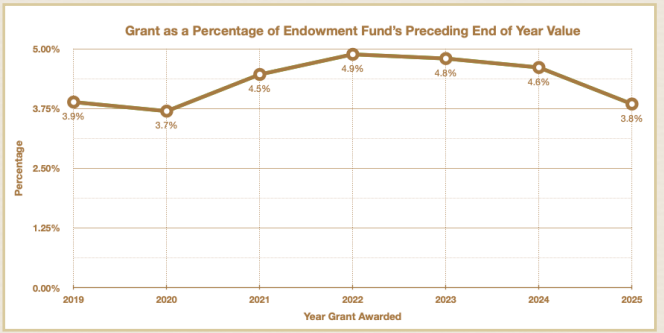
Mason Investment Advisory Services based in Reston became our fund manager at the end of 2024.

ENDOWMENT FUND AT A GLANCE

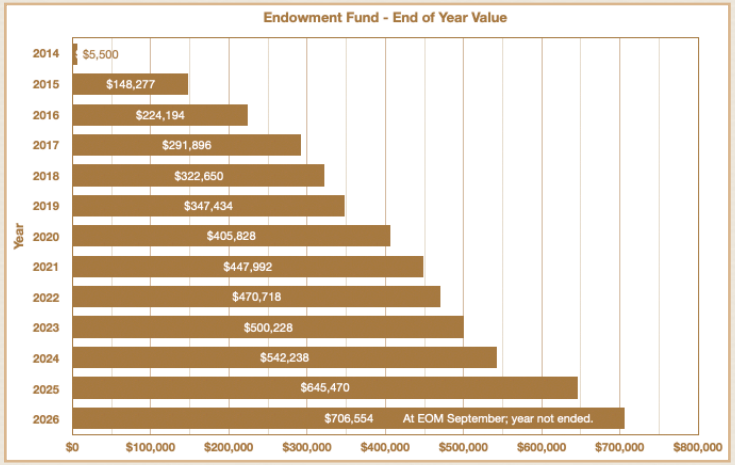
AT THE END OF THE 3RD QUARTER OF 2026

GRANTS TO THE CHURCH





No grants were awarded from 2014 through 2018. The first grant was was made in 2019. The Fund's continued growth has allowed the Committee to make annual grants. Over the life of the fund, grants totaling $145,317 have been made to St. Anne's.



END OF YEAR (EOY) VALUE OVER THE LIFE OF ENDOWMENT FUND

The chart to the left reflects the EOY value of the fund from inception (late 2014) through the present. The 2026 value reflects the value as of EOM September and will be updated at the end for Q4.

CURRENT INVESTMENT MIX

Cash Reserves 1.04%

Income Funds (bonds, Treasury securities) 21.12%

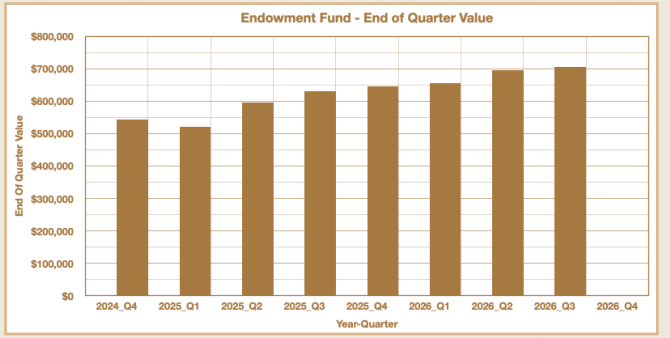
Growth Funds (domestic and international large cap value and growth) 48.23%

Aggressive Growth Funds (small cap, energy) 29.61%

END OF QUARTER (EOQ) VALUE FROM 2024 Q4 TO PRESENT

The chart to the right reflects the value of the fund at the end of each quarter during the time the fund has been managed by Mason Investment Advisory Services.

2024 Q4 (12/31/2024) Ending Value: $542,278
2026 Q3 (9/30/2026) Ending Value: $706,554
** Ending values rounded to the whole dollar.*



ST. ANNES SOCIETY

St. Anne's Society members are those people who have contributed to the St. Anne's Episcopal Church Endowment Fund. Thank you to everyone* who has ever contributed by donation or estate gift. These contributions are making a difference to the church and its missions in perpetuity.

Anonymous (3)
~ Alice Abrash [1, 2]
David Allen
Susan Allen
Richard America
Eve Angerosa
Jason Angerosa
Ronan Angerosa
Daria Antonucci
Boriana Bakaltcheva
Joe Bellman
Jerry Benson
Pamela Benson
Melissa Bessey
Don Boileau
Kathy Boileau
Bruce Boston
Jean Boston
Daniel Breeding
Kathleen Breeding
Audree Brickson
Michael Broddle
Lionel Brown
Nancy Brown
Rhoda Brown
Roger Brown
Bill Burton
Christine Cameron
Marlee Campbell
Gary Carsten
Lynn Carsten
Ann Chapman
Gerald Chapman
Dick Christensen
Elizabeth Rennie-Cline
Anna Mary Coburn
Laura Cochran
Wilson Cochran
Roger Conover
Shon Cooper
Laurie Corkey
Christine Cralle
Scott Cryer
John DeDona
Nancy DeDona
John Donnell
Robin Drake
Leon D'Souza
Marian Egge
Kay Evans
Susan Ficklin
Kimberley Flannigan
Maurice Fliess
~ Maurice Fliess [3]
Kam Flynn
Martha Furniss
Sean Furniss
Ingrid Geissler
Rich Geissler
Chip George
Robin George
Jean Gill
Stewart Gill
~Graham Gillen [4,5]
Angie Gray
Evan Gray
CJ Grish
Carol Grish
Bonnie Gruetzmacher
John Gruetzmacher
Haze Hanna
Barbara Helmich
Peggy Hobler
Lee Hobrla
Ellen Hoffman
John Hoffman
Rosie Horn
Julie Hurd
Carol Hurlburt
Sid Hurlburt
Ed Johnson
Jeanne Johnson
Mary Johnson
Vance Johnson
~ Vance Johnson [3]
Jim Jones
Paul Jones
Suzi Jones
Verlaine Jones
Anne Juran
James Juran
Gabriel Kajeckas
Marguerite Keady
Dorry Kee
Emily Kimm
Douglas Knowles
Carolyn Kovar
Richard Kovar
Jonathan Krentel
Heather Lawson
Carol Leos
Art Light
Margaret Light
Billie Mainring
Judith Mall
Bill Malzahn
Mary Malzahn
Deirdre McGuire
Patricia Minson
Terry Morrow
Carolyn Morse
Rebecca Mulder
Larry Murphy
Sarah Murphy
Mac Murray
Merline Murray
Al Narvaez
Dabney Narvaez
Patricia Nicoson
Shelby Owen
Steve Owen
Mary Ann Panarelli
Liz Galvin Pao
Terry Pao
Jim Papile
Connie Pettinger
Larry Pettinger
~Larry Pettinger [3]
Peyton Pond
Clifton Poole
Kimberly Poole
Bob Rich
Mary Ann Rich
Jamie Roberson
Suzanne Robinson
Terry Robinson
Pam Russ
David Safford
Germaine Safford
Heather Safford
Thomas Safford
~Carl Scheeler [6]
James Scheeler
Nancy Scheeler
Stephen Schindler
Katharine S. Schindler
John Schwarz
Nellie Sidifall
Reuben Sidifall
Veda Simpson
Jane Smith
Tom Smith
Mary Szpanka
John Stonesifer
Susan Stonesifer
Edward Urbaniak
Lisa Van Hoecke
Robert Van Hoecke
James Vollman
Ray Walser
Sandra Walser
Laurel Wanrow
~ Preston Welch [3]
Annie Wilkinson
Kurt Wilkinson
Brian Wynne
Carol Wynne

Names preceded by a tilde (~) indicate a gift from that person in tribute to the person(s) or organization indicated by the subscript number(s) as listed:

1. St. Anne's
2. Ellen Lawrence
3. Jim Jones
4. Bob & Alice Bond
5. Charles & Cecilia Gillen
6. Jim Scheeler

ENDOWMENT FUND
(2014 - 2026)

Committee Members

Brian Wynne, Chair
Bill Burton
Jackie Kerr
Kim Poole, Treasurer
Kurt Wilkinson, Secretary

Former Committee Members

Jason Angerosa
Michael Broddle
Chris Cameron
Susan Ficklin
Jim Jones
James Juran
Dorry Kee
Larry Pettinger
Shiela Sanford
Ray Walser

*This list of St Anne's Society members is also available online (church website). Gift amounts are never disclosed publicly. Anonymous contributions (i.e., not publicly named) are also welcome and confidentiality maintained.

If you notice a misspelled name, our apologies please let the church office and endowment committee know so we can make the correction. If you should be on this list and were left off inadvertently, please let us know so we can include you.

ST. ANNES EPISCOPAL CHURCH
1700 Wainwright Drive, Reston, VA 20190 (703) 437-6530
www.stannes-reston.org

ST. ANNES EPISCOPAL CHURCH
Endowment Fund www.stannes-reston.org/st-anne-s-society