



GIVING TOGETHER FOR THE FLATHEAD VALLEY

2025 ANNUAL REPORT





OUR MISSION:

Whitefish Community Foundation is dedicated to fostering philanthropy, building endowments, and helping donors and nonprofits benefit the greater Flathead Valley.

OUR CHARTER:

We provide effective ways for donors to support nonprofits

We advise donors on strategic giving priorities

We invest charitable dollars to maximize impact

We grow endowments to sustain nonprofits

We provide direct funding to fill critical needs

We lead initiatives that inspire giving

We strengthen local nonprofits to excel at their missions

Our end goal is to improve the quality of life in the Flathead Valley, which includes supporting nonprofits that provide valuable resources to our communities.

2025

ANNUAL REPORT



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FROM THE BOARD CHAIR AND CEO THANK YOU FLATHEAD VALLEY!

Dear Friends,

Last year, Whitefish Community Foundation proudly celebrated 25 years of impact in the Flathead Valley. Together, we marked this milestone with extraordinary momentum.

The Foundation began our anniversary year with \$67 million in charitable assets, and donors were inspired more than ever to put their charitable dollars to work. Over the course of the year, Whitefish Community Foundation granted \$21 million to nonprofits—an astounding level of impact for both the Foundation and the organizations we serve. Thanks to a record number of contributions and strong investment performance, we closed our 25th anniversary year with \$88 million in charitable assets. This reflects our donors' incredible generosity and provides solid footing for the future.

Following a recent strategic planning process, our Board of Directors reaffirmed our mission to cultivate a passion for giving, build endowments, and work with donors and nonprofits to benefit the Flathead Valley. As we embrace our growth, we are prioritizing long-term sustainability, deeper valley-wide impact, and strong leadership within the nonprofit sector. To support this vision, we are investing in our own capacity by growing our team, ensuring we can continue to serve our nonprofit partners, strengthen donor relationships, and respond to emerging needs across our community.

As the Flathead Valley continues to grow, so does the opportunity for each of us to make a difference. Whether through a first-time gift or by leaving a legacy, every act of generosity contributes to something larger than ourselves.

Thank you for being part of this work. Your trust and partnership make it all possible!

With gratitude,

Doug Reed, Board Chair



Alan Davis, President/CEO



COMMUNITY IMPACT

\$120M

CUMULATIVE GRANTS
TO NONPROFITS SINCE 2000

\$51.9M

TOTAL DONOR
ADVISED GRANTS TO
NONPROFITS SINCE 2000
(more on page 20)

\$43M

GRANTED THROUGH THE
GREAT FISH COMMUNITY
CHALLENGE SINCE 2015
(more on page 10)

\$3.5M

COMMUNITY GRANTS
AWARDED SINCE 2000
(more on page 12)

\$1.4M

MAJOR COMMUNITY
PROJECT GRANTS
AWARDED SINCE 2011
(more on page 14)



The Flathead Valley's Home for Charitable Giving for over 25 years

A YEAR THAT MOVED OUR COMMUNITY FORWARD

RECORD GENEROSITY. REAL IMPACT ACROSS THE FLATHEAD VALLEY



\$21.5M

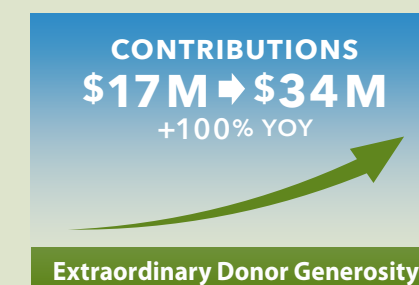
Granted to nonprofits in 2025

135

Local nonprofits funded in 2025

Supporting the nonprofits that strengthen lives in every corner of our community.

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WHAT WE ACHIEVED TOGETHER

- More support helping nonprofits meet critical needs
- More opportunity for local children and families
- Stronger nonprofits serving our community
- Greater long-term stability through growing endowments

INVESTING IN THE FUTURE

- Deepening valley-wide impact
- Growing impact of our grant programs
- Expanded team to better serve nonprofits and donors
- Focus on long-term sustainability

*Every ACT OF GENEROSITY contributes
to something LARGER THAN OURSELVES.*



CIRCLE OF GIVING

The Circle of Giving is Whitefish Community Foundation’s core group of donors who give \$5,000 or more annually to support the grant programs and mission of Whitefish Community Foundation. Circle donors pool their resources to multiply their impact and provide critical funding to hundreds of local nonprofits serving the Flathead Valley.



2025 ALLOCATION:

83.3% 16.7%

DIRECT GRANTS TO LOCAL NONPROFITS

The Circle provides critical grant dollars for the Great Fish Match Fund, Community Grant Fund, Major Project Fund, Kids Fund, and Emergency Response Fund.

WHITEFISH COMMUNITY FOUNDATION

The Circle supports direct program costs to host the Great Fish Community Challenge and our Nonprofit Development Program. Administrative overhead of the Foundation is covered by our separate operating endowment, ensuring 100% of Circle of Giving donations benefit Flathead Valley nonprofit programs.

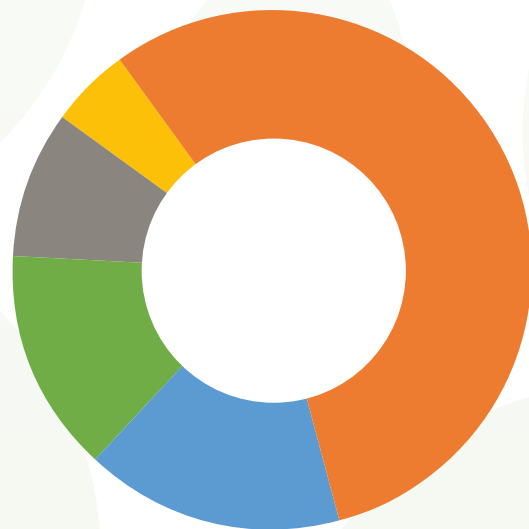
\$2.8M
DONATED TO THE CIRCLE OF GIVING PROGRAM IN 2025

280
DONORS IN 2025

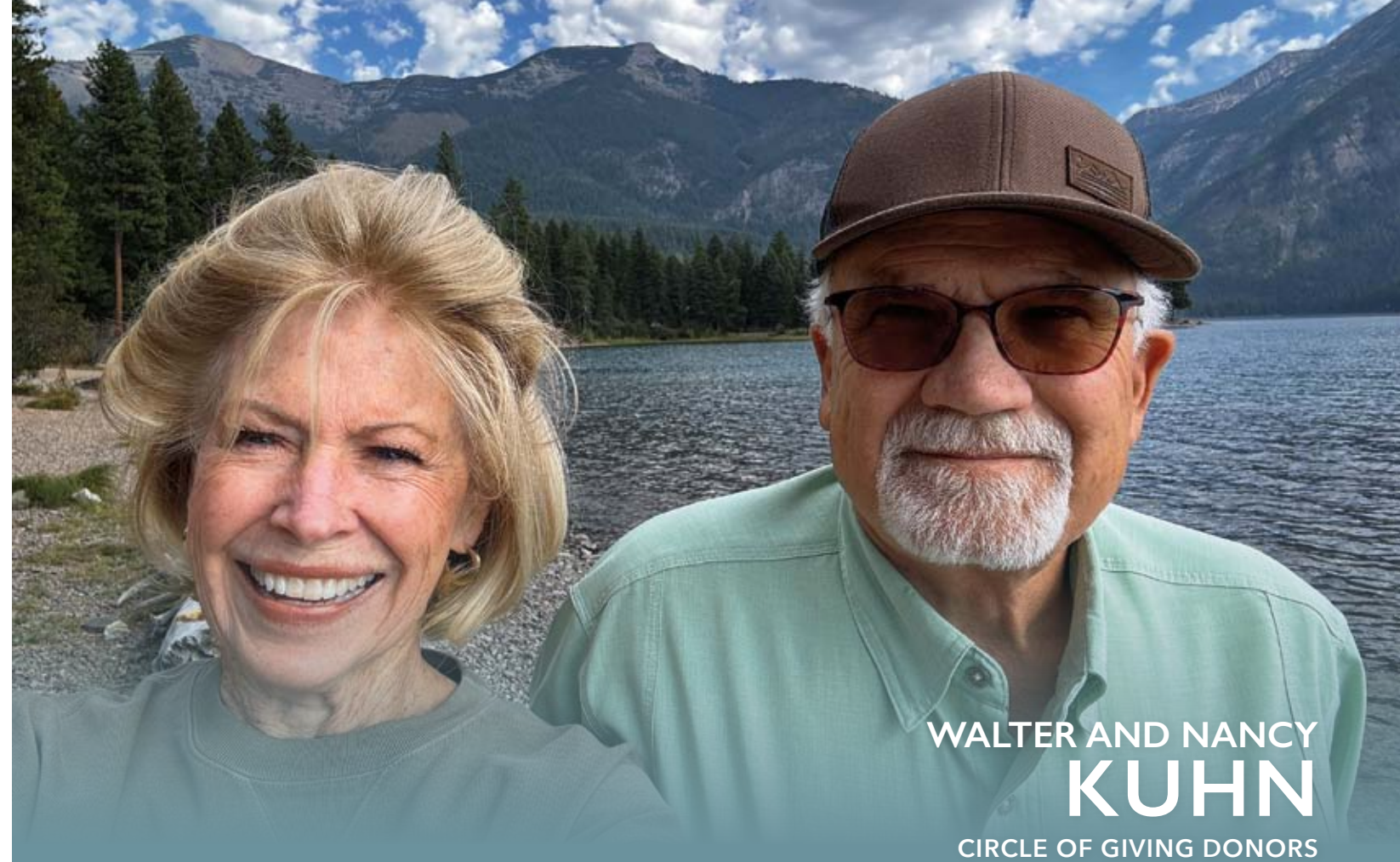
\$11,098
AVERAGE GIFT SIZE IN 2025

135
LOCAL NONPROFITS SUPPORTED IN 2025

GRANTS BY NONPROFIT SECTOR:



- Health & Human Services, 56%
- Education & Arts, 16%
- Sports & Recreation, 14%
- Conservation & Animals, 9%
- Civic & Community Building, 5%



WALTER AND NANCY KUHN
CIRCLE OF GIVING DONORS

When Walter Kuhn first arrived in Bigfork in 1990, he was struck by its small-town character and the way neighbors showed up for one another. More than three decades later, that same spirit of volunteerism continues to guide Walter and his wife, Nancy, longtime community leaders and new members of the Whitefish Community Foundation’s Circle of Giving.

Walter quickly became involved with what is now the Community Foundation for a Better Bigfork, where he has served in leadership roles and helped guide numerous community projects. “You get involved in anything here and pretty soon you are president,” he says with a smile, an observation that reflects both Bigfork’s hands-on culture and his willingness to step forward when something needs to get done.

Over the years, Walter has helped shape several projects in Bigfork, including the remodel and expansion of the lobby at the Bigfork Center for the Performing Arts. In the early 1990s, he also graded the Bigfork Nature Trail after it was abandoned as an east entrance into town, helping transform it into a community asset. He later oversaw construction of the sidewalk from Grand Avenue to Marina Cay, strengthening connectivity in the village core.

Nancy shares his commitment to service. She serves on the board of the Bigfork Art and Cultural Center and reviews scholarship applications for the Flathead Valley Community College Foundation.

“neighbors helping neighbors”

Together, the Kuhns also invest in the next generation. Walter established a scholarship at FVCC in honor of his father to support heavy equipment studies, and the couple funds an internship at the University of Montana’s Flathead Lake Biological Station. They are also working to conserve one of the last pieces of undeveloped land in Bigfork as open space for the community.

Joining the Circle of Giving felt like a natural extension of their commitment to service. “We like the way Whitefish Community Foundation funds projects throughout the whole valley,” Walter said.

In a place where, as Walter puts it, “the biggest thing is volunteerism,” the Kuhns’ leadership and their Circle of Giving support helps ensure that Bigfork’s tradition of neighbors helping neighbors continues for future generations.



THANK YOU TO OUR CIRCLE OF GIVING MEMBERS

FOR LIFTING UP OUR ENTIRE NONPROFIT
COMMUNITY AND INSPIRING THE FLATHEAD
VALLEY TO GIVE.



Anonymous (6)
Christine and Kevin Abel
Ruth and David Ackroyd
AGL Foundation*
Teri and Jeff Allen*
Erin and Aaron Alme
Lisa and Ole Anderson
Kate and Chip Andrews
Brent Appelgren
Heidi Stamm and Tom Armbruster
Val and Beau Armstrong
Kiita Foundation
(Jo-Ann and Jim Armstrong)
Mary Dojnik and IV Ashton
Carol and Richard Atkinson*
Lisa and Bob Bailey
Julie and Summerfield Baldrige
Ledjie and Phillip Ballard
Sharon and Dean Baltzell
Louise and Tom Bannigan
Charlene and Stephen Barasch
Trish and Rick Bartoskewitz
Lana and Joe Batts
Cindy and Mogens Bay*
Betsy and Bill Bayne*
Cheryl and Colton Behr
Tierney and Jon Beizer
Linda and Terry Bell
Barbra and Don Bennett
Kathy Friday and Alec Biele
Bonnie and Rick Billuni
Mary Ann and Bill Bindley
Lannette and Todd Bloom

Kathy and Craig Bolme
Sandy and Dick Boyce*
Lauren and Clay Bradley
Braig Family
Anne and Bud Brigham
Tara and Matt Brister
Deb and Matt Brooks
Beth and Jerome Broussard
Carissa and Mark Brown
Rockwood Brown (in memoriam)
Ellen Brunsberg
Karen and Ethan Budin
Ann and Brad Bulkley
Lindsey and Todd Burris
Jennifer Burrough
Eileen Bocci Campbell
Dorothy and Luther Campbell
Thomas Campbell
Kris and Tom Carlson
Janice and James Case*
Maureen Casey
Helen and Larry Cates
Central Heating, Cooling,
Plumbing & Electrical
Chrest Foundation
Heather and Bill Christopher
Jane Kollmeyer and Terry Chute
Brian Clark
Lauren Sparks and Ron Clearwater
Nadine and Braydon Coburn
Dyan and Michael Colby
Ann and Andrew Cole
Liz and Stewart Coleman
C.K. and Jim Coles
Anne and John Collins*
Linda Cornutt

Stacy and Michael Covey
Karyn and Brenden Craig
Felice and Dow Crocker
Katherine and Gordon Cross
Tish and Gary Cruciani
Beverly and Larry Dale
Annell and Gary Danczyk
Nicci and J.D. Daniher
Scott Darkenwald
Frances and Alan Davis
Stephanie and Davis Deadman
Candy and Eddie DeBartolo
Jane Decker
Lynnette and Mark Donaldson
Justine Strobel and Mark Doyle
Myra and Michael Doyle
Nora and Blake Dunlop
Kate and Ross Dworman
Lynn and Ben Dykstra
Margaret Davis and Bruce Ennis
Linda and Jim Farley
First Interstate BancSystem Foundation
Jennifer and John Flink
Margaret Askew and Patrick Foley
Kate and Michael Fraser
Laurel and Matt Frazer
Kirsten and Putt Fuller
Daniel Gagen and Paul Chartrand
Barbara and Sean Gallagher*
Garbacz Family
Lindsey and Keith Gardner
Robin and Tyler Gardner
Kathy and Greg Garrison
Janelle Gentry
Goguen Family
Adele Goldberg

Davey Gordon
Cheryl Watkins and Dick Gordon*
Andrea Sliter Goudge
Linda Engh-Grady and Dave Grady
Cindy Granmo
Colleen and Peter Grant*
Sarah and John Graves*
Cameron Blake and Sandy Gray
Jeanine and Ken Green
Darci and Tim Greenwood
Cindy and Joe Gregory*
Jill and Chris Gwaltney
Michelle and Cyrus Hadidi
Jes and John Hagale
Neva and Randy Hall
Robyn Hall
Dana Hanna
Sue and Tom Harding
Sadie and Evan Harris
Suzy and Clay Harrison
Margo and Gary Harrod
Hatlen Foundation
Camilla and Barnes Hauptfuhrer
Shannon and Brian Haycox*
Kelly and Bob Hayes
Patty and Bob Hayes
Iona McMillan and Dennis Heintzig
Jill and Grant Henderson
Cathy and Doug Hetrick
Lisa and Doug Hickok
Suzanne and Richard Hildner
James Hollensteiner (in memoriam)
Donna and John Holmstul
Lindsay and Chad Hudson
Margaret and Mark Hyer
Ila B. Dousman Fund*

Iron Horse Foundation*
Marcie and Sage Jackson
Margo Jacobs and Joe Valko
Scott Janni
Lou Anne and Jeff Jensen
Barbara and Mike Jenson*
Pat and Bob Jepsen
Ann and Paul Jeremiassen*
Leslie and Dan Johnson
Nicole Acton Jones
and Chris Jones
Ann and Bill Jones
Brenda and Jonny Jones
Pat and Sam Jones
Robyn and Mark Jones
Sarah and Fred Jones
Molly Miller and Mark Jungerman
Sharon and Bill Kahle
Kalpakis Family
Melissa and Pierre Kaptanian
Melinda and Mike Kartsonis
Rachel Kelton
Kemo Sabe
Gina and A.J. King
Maureen and John King
Rick Kinonen
Julie and Jude Konat
Jon McBride and John Kramer*
Nancy and Walter Kuhn
Julie Williams and Marshal Kushniruk
Cindy and Tom LaChance
Susan Lacosta
Susan and Blair LaGrandeur
Ginny and Frank Larence
Mignon and Jay Latimer
Gerry and Frank Leftwich

Jody and Kevin Lernihan
Lindsay Cross-Lerou
and Thomas Lerou
Sherry and Dave Lesar*
Amy Cobbs and Michael Levin
Moira and Justin Linam
Susan Stevenson and David Littleton
Maureen Bolton and Edwin Lojeski
Antonella and John LoPresti
Kristen Sramek and Josh Lozman
Ruth and Bret Luedke
Steve Lull
Kaden Macor
Linda and Charlie Maetzold*
Allison and Rick Magnuson
Janet Malone
Liz Marchi
Mark Family
Andy and Natalie Markham
Sarabeth and John Martin
Jan Mayo
Libby and Murray McCabe
Dottie McGowan
Mary Jo and Marty Mehl
Meislik Family
Keith Melanson
Abbie Milisci
Lori Miller
Emmy and David Montanye
Betty Monzingo
Ellen and Matt Moran
William G. Myers, Jr.
Gloria and Leif Nelson
Marilyn and Rick Nelson
Amy Johannes and Doug Newton
Terrie and Tom Nitopi



THANK YOU TO OUR CIRCLE OF GIVING MEMBERS



Kim and Bob Nystuen
 Kelly McMahon O'Brien
 Sue and Brett Oemichen
 Danielle and Sam Olsen
 Greg and Cyndi Olson
 Pam and Randall Onstead
 Claudine and T.C. Origitano
 Marcia Pade
 Missy and David Parrish
 Val and Larry Parsons
 Chantel and Joel Pemberton
 Pam and Vin Perella
Sandy and Dan Perl
 Janen and Robert Pero
 Lisa Rigoli and Randy Phillips
Coco and Ross Pickert
 Natasha and Jonathan Proto
Blanche Puffer (in memoriam)
Quinn Family*
 Brad Ray and James Hinchey
Nikki and Doug Reed*
 Reggie's Quick Lube
 Victoria Reich
 John Repke
 Beckie Reynolds
Sue and Hank Ricklefs
 Eric Schmidt and Deven Robinson
Karen and Ron Rosenberg*
 Maria and Gerry Rosetti
 Leslie and Rene Rousselet
Laura Reynolds
 and **Walter Rowntree**
Kim and George Ruhana
Melinda Ryan
Charlene Rygg

Julie and Scott Sanderude
 Marcella and Mark Sandry
 Carol and John Santa
 Sandy and Al Schellinger
Stacy Schlinger*
Mark Schmidt*
 Liz Keeney Scholten
 Jennifer and Tyler Seibert
Marie and Mike Shaw
 Marla and Van Shaw
 Babette Shennan
Janna and Jamie Shennan*
 Taryn and Grier Shennan
 Nikki and Everit Sliter
 Diana Strassmann and Jeff Smisek
Ashley and G. Stacy Smith
 Jill and Kevin Smith
 Caroline and Kip Smith
Linda Smith
Lucy Smith
 Jennifer and Mark Smith
 Claudia and Samuel Smith
 Mary and Stewart Smith
 Martha and William G. Smith
Carole and Roger Spragg*
 Angie St. Onge and Jason Spring
 Lisa and Jim Stack
 Sandy Stash
 Jen and Gus Stein
Margy and Rob Stevens
 Kelly and Kim Stimpson
 Lisa and Al Stinson
Nancy and David Stokes
 The Strong Fund
Jill and Jim Stroud
 Summit Beverage
 Jordan and Travis Taylor
Temple Family
 Lynn Grossman and Dave Thomas
 Kristal and James Thompson
 Brogan Thomsen
 Edie Tinkler
 Tracy Foundation

Heather and Scott Tucker
 Priscilla and Garrett Turner
 Toni and Jim Turner
 Michele and Mitchel Usibelli
 Kristen and John VanDenburgh
Linda and Andy Viens
Lori and Robb Voyles*
 Beth and John Wallace
 Julie and Rob Waller
Dori and Bill Walton*
Katie and Ben Ward
Leslie and Mike Warning
Boots and Alan Warrick*
 Carol Bibler and Jim Watson
Byrdie and Ken Wessels*
Ardy and Steve Whisler*
 Liz and Shane Widdifield
Mary and Hal Williamson
 Sue and Rick Williams
 Meggen and Brian Wilson
Bet and Doug Wise
Susan and John Witt*
 Debra Wolf

Names in **bold** represent donors who have given at the Circle level for five years or more, and names with an asterisk* represent donors who have given for 10 years or more.



DON AND BARBRA
BENNETT
 CIRCLE OF GIVING DONORS

"Barbra and I were both born and raised in Montana and have been married for 46 years. We chose to build our life and raise our three daughters in Columbia Falls because of the strong sense of community and shared values that define the Flathead Valley. That environment shaped our daughters, and today we are proud to see them carrying forward those same values of compassion and service.

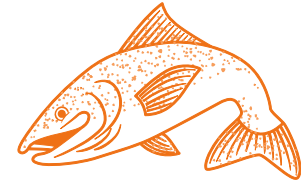
"The collective impact multiplies what any one of us could accomplish alone."

We have always believed in giving back, both financially and through volunteering. Joining the Circle of Giving was a natural step for us because we trust Whitefish Community Foundation as a credible and thoughtful steward of donor funds. Having experienced their grant process firsthand, we have seen their professionalism and their commitment to carefully vetting recipients and ensuring funds are effectively invested in organizations that meet real community needs.

As members of the Circle of Giving, we take comfort in knowing we are part of something larger than ourselves. The collective impact multiplies what any one of us could accomplish alone. We encourage others to consider joining, because when we give together with intention, we strengthen the fabric of this valley and the impact is profound."



GREAT FISH COMMUNITY CHALLENGE



The 11th-annual Great Fish Community Challenge was the most impactful yet! More than 4,000 donors contributed nearly \$6.7 million to 85 Flathead Valley nonprofits in just one month. Key to the success of the Challenge is the Great Fish Match, made possible by Whitefish Community Foundation's Circle of Giving and other donors who contribute. In 2025, the Great Fish Match grew to \$1,372,532, resulting in an additional \$17,000 grant for each qualifying organization. With an additional \$59,500 in incentive grants and special awards, the grand total awarded through the 2025 Great Fish Community Challenge was an astounding \$8,098,663!

\$43M

RAISED SINCE INCEPTION
IN 2015

\$8,098,663

RAISED IN THE 2025
CHALLENGE FOR
85 NONPROFITS

\$1,372,532

TOTAL 2025 MATCH FUND

\$17,000

MATCH ON \$25K RAISED
BY EACH NONPROFIT

21%

INCREASE IN AMOUNT
RAISED IN 2025

\$368,000

WCF COSTS TO HOST
THE 2025 CHALLENGE

FLATHEAD 4-H FOUNDATION CHALLENGE ACCEPTED!



The Great Fish Community Challenge helps nonprofits across the Flathead Valley expand awareness of their work, connect with new supporters, and raise vital funds for their programs. In 2025, the Flathead 4-H Foundation participated in the Challenge for the first time and raised \$40,230 from 104 donors to support hands-on learning and leadership opportunities for local youth. Additionally, the organization earned a \$17,000 matching grant and the New Fish on the Block Award from Whitefish Community Foundation, bringing the total amount raised in the 2025 Challenge to \$59,730!

Flathead 4-H Foundation exemplifies what is possible when nonprofits embrace the Challenge as an opportunity to share their broader story and connect with new donors.

"The Great Fish Community Challenge was a really exciting experience for our 4-H community," Board Member Jill Kahanek said. "It gave us a chance to tell the bigger story of 4-H and how, beyond animals at the fair, young people discover science, trades and leadership with the guidance of dedicated volunteer mentors."

The campaign also helped the organization grow its network of supporters and connect with other local nonprofits. "It was inspiring to see new donors step forward and to feel part of a larger community working together for the good of the Flathead Valley," Jill said.



TOTAL RAISED

BY THE NONPROFITS PARTICIPATING IN THE
2025 GREAT FISH COMMUNITY CHALLENGE
INCLUDING THE MATCH AND SPECIAL AWARDS:

\$8,098,663

Abbie Shelter	\$220,279	Glacier Nordic Club.....	\$108,610
Alano Club of Kalispell.....	\$116,280	Glacier Skate Academy.....	\$44,686
Alpine Theatre Project.....	\$114,910	Glacier Symphony, Orchestra and Chorale.....	\$91,788
Amazing Place Music.....	\$62,666	Good Grief Group	\$58,295
Backpack Assistance Program.....	\$128,254	Habitat for Humanity of Flathead Valley	\$113,522
Big Brothers Big Sisters NW Montana.....	\$48,926	Housing Whitefish.....	\$68,395
Bigfork Art and Cultural Center	\$99,862	Humane Society of Northwest Montana.....	\$110,745
Bigfork Food Bank.....	\$99,945	Immanuel Foundation	\$75,956
Bob Marshall Wilderness Foundation	\$110,619	Kalispell Education Foundation	\$201,818
Boys and Girls Clubs of Glacier Country	\$67,280	Land to Hand.....	\$200,342
CASA for Kids.....	\$192,800	Lighthouse Christian Home & Services.....	\$117,675
Center for Restorative Youth Justice.....	\$112,592	Logan Health Foundation	\$90,584
Child Bridge	\$223,900	Montana Conservation Corps	\$72,755
Children's House Montessori School	\$45,420	Montana Kayak Academy	\$46,746
Code Girls United	\$60,445	Montana Youth Diabetes Alliance.....	\$37,724
Columbia Falls Community Market	\$8,518	My Glacier Village.....	\$50,274
Conrad Mansion Museum	\$48,550	Nate Chute Foundation.....	\$314,766
Creston Firefighters Association.....	\$48,475	North Valley Food Bank.....	\$286,278
Discovery Developmental Center	\$17,598	North Valley Music School.....	\$135,096
DREAM Adaptive Recreation.....	\$352,531	Northwest Montana Community Land Trust.....	\$58,300
Driving Hope	\$68,070	Northwest Montana History Museum.....	\$49,695
Flathead 4-H Foundation	\$59,730	Project Whitefish Kids.....	\$99,955
Flathead Area Mountain Bikers.....	\$64,713	Samaritan House.....	\$182,765
Flathead Audubon Society	\$66,065	Shepherd's Hand	\$71,385
Flathead County Sheriff's Posse	\$32,078	Sparrow's Nest of NW MT.....	\$202,355
Flathead Food Bank.....	\$134,239	Stumptown Art Studio.....	\$52,616
Flathead Industries	\$41,966	Tamarack Grief Resource Center	\$32,399
Flathead Land Trust	\$127,019	The Nurturing Center	\$29,252
Flathead Library Foundation	\$103,778	Two Bear Therapeutic Riding Center	\$66,621
Flathead Rapids Youth Soccer.....	\$24,897	West Shore Food Bank.....	\$79,588
Flathead Rivers Alliance	\$45,211	Whitefish Community Center.....	\$73,235
Flathead Valley Community College Foundation	\$134,253	Whitefish Community Foundation.....	\$65,371
Flathead Valley Ski Education Foundation	\$88,175	Whitefish Dog Park	\$69,741
Flathead Valley United	\$56,305	Whitefish Education Foundation.....	\$56,210
Flathead Warming Center	\$175,011	Whitefish Firefighters Association	\$56,160
Flathead Youth Home.....	\$103,234	Whitefish Lake Institute	\$79,956
Foy's to Blacktail Trails	\$63,236	Whitefish Legacy Partners.....	\$204,402
Friends of the Flathead Avalanche Center	\$60,869	Whitefish Review.....	\$64,956
Gateway to Glacier Trails.....	\$59,922	Whitefish Theatre Co.....	\$133,042
Glacier Art Museum.....	\$60,232	Whitefish Veterans Support Team.....	\$76,309
Glacier Hockey Association	\$29,459	Wings Regional Cancer Support	\$44,545
Glacier Institute	\$64,069	Writing Coaches of Montana	\$42,484
Glacier National Park Conservancy	\$138,885		



COMMUNITY GRANT PROGRAM



The Community Grant Program was created in 2000 to have a broad impact on communities throughout the Flathead Valley. Funded by Whitefish Community Foundation's Circle of Giving, the Community Grant Program has awarded nearly \$3.5 million to local nonprofits over the past 25 years. Last year, the program expanded to include a category for nonprofits whose missions are focused on youth sports.

\$3.5M

COMMUNITY AND YOUTH SPORTS GRANTS AWARDED SINCE 2000

\$372,750

COMMUNITY AND YOUTH SPORTS GRANTS AWARDED IN 2025

49

NONPROFITS RECEIVING A COMMUNITY OR YOUTH SPORTS GRANT IN 2025



Northwest Montana Community Land Trust, Inc.



COMMUNITY GRANT IMPACT

NORTHWEST MONTANA COMMUNITY LAND TRUST

For many first-time homebuyers, the dream of homeownership can feel just out of reach—not because of the monthly mortgage payment, but because of the upfront costs required to close on a home. In Northwest Montana, those closing costs often range from \$6,000 to \$10,000, creating a significant barrier for many aspiring homeowners.

In 2025, an \$8,000 Community Grant from Whitefish Community Foundation helped the Northwest Montana Community Land Trust (NWMTCCLT) remove that barrier for women pursuing affordable homeownership. Combined with support from other local funders, the grant helped create a pool of funding to provide \$3,000-\$6,000 grants to female heads of household purchasing their first NWMTCCLT homes.

Since the program launched, four women have received assistance to help cover closing costs and other expenses associated with purchasing a home.

For one mother and her teenage daughter, the support helped turn years of waiting into a life-changing milestone. After spending 18 months on NWMTCCLT's waitlist and previously living in an RV before moving into a small apartment, the family was able to purchase a permanently affordable home in Kalispell. The three-bedroom home provides space not only for stability and comfort, but also for a home office that allows the mother to work remotely while supporting her family.

Their new home became available through the generosity of a local family who chose to sell their property to NWMTCCLT below market value, ensuring it would remain permanently affordable for future homeowners.



EMERGENCY RESPONSE GRANT PROGRAM

\$626,491
EMERGENCY RESPONSE GRANTS AWARDED SINCE 2009

\$211,473
EMERGENCY RESPONSE GRANTS AWARDED IN 2025

16
NONPROFITS RECEIVING AN EMERGENCY RESPONSE GRANT IN 2025

Whitefish Community Foundation's Community Emergency Response Fund provides flexible resources for nonprofits facing an unexpected emergency. These grants may be deployed rapidly to support nonprofits during a recognized emergency or disaster, or they may be utilized to fund projects or repairs that must be addressed immediately in order to keep a local nonprofit operating.

In 2025, we deployed a total of \$211,473 in Emergency Response Grants. This included \$199,768 for 14 food-access organizations in northwest Montana that experienced record numbers of families and individuals utilizing their services in response to the pause to the federal Supplemental Nutrition Assistance Program (SNAP).

2025 EMERGENCY RESPONSE GRANTS

- Bigfork Food Bank
- Columbia Falls Food Bank
- FAST Blackfeet
- Flathead Food Bank
- Flathead Youth Home
- Kalispell School District-HEART Program
- Land to Hand
- Libby Food Pantry
- North Valley Food Bank
- North West Montana Veterans Stand Down
- Samaritan House
- Tobacco Valley Food Pantry
- Troy Food Pantry
- West Shore Food Bank
- Whitefish Community Center
- Yaak Food Cupboard





MAJOR COMMUNITY PROJECT GRANTS

\$1,409,000
MAJOR COMMUNITY
PROJECT GRANTS
AWARDED SINCE 2011

\$430,000
MAJOR COMMUNITY
PROJECT GRANTS
AWARDED IN 2025

6
NONPROFITS RECEIVING
A MAJOR COMMUNITY
PROJECT GRANT IN 2025

Whitefish Community Foundation's Major Community Project Grant Program is dedicated to helping nonprofit organizations complete capital projects that will have a significant and positive effect on communities in the Flathead Valley.

2025 MAJOR COMMUNITY PROJECT GRANTS

\$100,000 AWARDED TO COLUMBIA FALLS KIDS FOUNDATION

To remodel an old school into a vibrant hub for nonprofits that serve youth and families

\$100,000 AWARDED TO DREAM ADAPTIVE RECREATION

For a fully-accessible headquarters building at Whitefish Mountain Resort

\$100,000 AWARDED TO SAMARITAN HOUSE

To build affordable apartments for low-income families

\$50,000 AWARDED TO ALANO CLUB OF KALISPELL

To expand meeting space for individuals seeking recovery from addiction

\$50,000 AWARDED TO MIRACLE LEAGUE OF NORTHWEST MONTANA

To resurface the only baseball field in the Flathead Valley that is fully accessible to people with disabilities

\$30,000 AWARDED TO BIGFORK YOUTH BASEBALL ASSOCIATION

To complete construction of a new home ball field



MAJOR COMMUNITY PROJECT GRANT IMPACT

ALANO CLUB OF KALISPELL



The Alano Club of Kalispell is a place where individuals and families impacted by addiction can find connection, support, and hope. In 2025, a Major Community Project Grant from Whitefish Community Foundation helped the organization expand its meeting space, allowing the Club to significantly increase the number of recovery meetings and support programs it can host each week.

Today, the expanded space supports a growing range of groups, including Alcoholics Anonymous, Narcotics Anonymous, Wellbriety Native American recovery meetings, Co-Dependents Anonymous, and a new veterans recovery group. With the addition of the new meeting room, the Alano Club now hosts about 85 weekly meetings, serving more than 1,400 individuals each week. The space also allows the organization to host gatherings that help recovering individuals and their families build supportive communities.

For people like Samson, the Alano Club has been life-changing.

After 36 years of addiction that began in childhood—including multiple treatment attempts, legal trouble, and the loss of his job, marriage, and housing—Samson entered treatment again in 2022. When he returned to the Flathead Valley, he began attending meetings at the Alano Club and found the consistency and community he needed to stay sober for the first time.

Today, Samson has reconnected with his wife and family and serves as the Alano Club's assistant manager, helping create the same welcoming space that supported his own recovery.

Stories like Samson's are why the Alano Club's expanded meeting space matters. By creating more room for recovery groups and community support, the organization can ensure that anyone seeking help or supporting a loved one has a place to turn.



MICRO GRANT PROGRAM

Whitefish Community Foundation's Micro Grant Program provides a low-barrier path for small and recently established nonprofits to apply for up to \$1,000 in funding. For many nonprofits, receiving a Micro Grant is the first step in developing a relationship with the Foundation. **In 2025, these Flathead Valley nonprofits received a \$1,000 Micro Grant:**

- Coffee with Survivors
- Columbia Falls School District
- Flathead Association of Senior Citizens
- Flathead Senior Living Community
- Flathead Shelter Friends
- Kalispell School District
- Mountain Brook Homestead Foundation
- NeighborWorks Montana
- North Shore Nordic Club
- Whitefish Songwriter Festival
- WorkshopMT





KIDS FUND GIVING VOICE TO CHILDREN



Whitefish Community Foundation created the Kids Fund in 2020 to support impactful programs for Flathead Valley children who are homeless or at risk of becoming homeless. Kids Fund grants focus on shelter, food access, health and mental health, education, and safety.

2025 KIDS FUND GRANTS

\$50,000 AWARDED TO LAND TO HAND

To support the Kids and Family Pantry project in Columbia Falls

\$50,000 AWARDED TO MONTANA PEDIATRICS

To support mental and behavioral health programs for youth in the Kalispell School District

\$50,000 AWARDED TO NATE CHUTE FOUNDATION

To support peer-to-peer mental health and suicide prevention training in local public schools

\$30,000 AWARDED TO KALISPELL SCHOOL DISTRICT-HEART PROGRAM

To provide families in crisis with safe, stable housing

\$20,000 AWARDED TO CENTER FOR RESTORATIVE YOUTH JUSTICE

To support a Youth Program Director & School Liaison to work within Flathead Valley school districts, offering teens meaningful accountability opportunities outside of the juvenile justice system

\$10,000 AWARDED TO KALISPELL EDUCATION FOUNDATION

To support the implementation of a nationally renowned model that helps schools build comprehensive mental health systems to support student well-being and prevent suicide

\$742,846

KIDS FUND GRANTS
AWARDED SINCE 2020

\$210,000

KIDS FUND GRANTS
AWARDED IN 2025

6

NONPROFITS
RECEIVING A KIDS FUND
GRANT IN 2025

“The Kids Fund changes the lives of local youth by investing in nonprofit programs that open doors, create opportunities, and provide the support kids need to thrive.”

-Gordon Cross, WCF Board Member and Kids Fund Committee Chair



KIDS FUND IMPACT KALISPELL SCHOOL DISTRICT-HEART PROGRAM



When families experience housing instability, the impact on children can be immediate and profound. The HEART Program works with students in the Kalispell and Evergreen school districts who are homeless or at risk of homelessness, ensuring they remain connected to school and support services during times of crisis.

In 2025, a \$30,000 Kids Fund Grant to Kalispell School District supported the HEART Program’s Stable Families Initiative, which provides immediate, flexible assistance such as short-term hotel stays, rental deposits, and utility support. Each family is also paired with a case manager who helps them navigate housing, employment, childcare, and other essential resources, allowing students to remain stable and engaged in school.

So far the Kids Fund Grant has allowed the HEART Program to serve 25 families.

One of these families is a single mother with four young children who had been living in a camper without utilities, relying heavily on friends and neighbors to get by. The HEART Program provided the family a two-month emergency hotel stay while staff helped her secure long-term housing, childcare assistance, and other resources. The program also helped cover the deposit for a long-term lease.

The stability made an immediate difference for her children. With a safe place to live, they began eating regular meals, enjoying nightly bath time, and settling into routines. Their teachers noticed dramatic improvements in mood and behavior.

Stories like this demonstrate how the Kids Fund can help families gain stability and give children the safe foundation they need to thrive.

“The stability made an immediate difference for her children.”





2025 SPECIAL AWARD WINNERS

WHITEFISH COMMUNITY FOUNDATION RECOGNIZES THE WORK OF OUTSTANDING NONPROFITS EACH YEAR



GREAT FISH AWARD \$10,000

The Great Fish Award is given annually to an organization that demonstrates tremendous leadership and dedication toward advancing their mission and impacting critical needs in local communities. **NORTH VALLEY FOOD BANK** was selected as the 2025 Great Fish Award recipient for the organization's work to provide food assistance to more than 1,200 people weekly through a free grocery store in Whitefish and mobile pantries in Columbia Falls, Essex, Olney, and Trego.



TOM QUINN MEMORIAL AWARD \$25,000

WHITEFISH EDUCATION FOUNDATION received the Tom Quinn Memorial Award and an accompanying \$25,000 grant to support the organization's capital campaign to replace band and orchestra instruments at the middle and high schools. Caeli Quinn presented the award in honor of her father, who served on Whitefish Community Foundation's Board of Directors from 2012 to 2016 and was named an emeritus board member in 2019.



LINDA ENGH-GRADY AWARD FOR NONPROFIT EXCELLENCE \$10,000

FLATHEAD LAND TRUST Executive Director **PAUL TRAVIS** received the Linda Engh-Grady Award for Nonprofit Excellence and an accompanying \$10,000 grant to support the organization's land conservation efforts. Whitefish Community Foundation's Board of Directors created this award to honor a local nonprofit leader who has elevated their organization to a new level.



WCF BOARD + FOUNDERS LEADERSHIP AWARD \$5,000

Whitefish resident **JAY LATIMER** received the WCF Board and Founders Leadership Award for his history of exemplary service and leadership to Flathead nonprofits, including Whitefish Community Foundation. Jay is an emeritus board member who served on Whitefish Community Foundation's Board of Directors for 13 years, including six years as the treasurer. A \$5,000 grant accompanied the award, which Jay directed to Habitat for Humanity of Flathead Valley.



JEAN AND BILL HOWARD MEMORIAL AWARD \$5,000

GLACIER SYMPHONY ORCHESTRA AND CHORALE received the Jean and Bill Howard Memorial Award and an accompanying \$5,000 grant for their dedication to providing Flathead Valley audiences with access to live classical symphonic, popular, and choral music at the highest level.



RUSS AND MARY JANE STREET COMMUNITY SERVICE AWARD \$5,000

WHITEFISH EDUCATION FOUNDATION received the Russ and Mary Jane Street Community Service Award and an accompanying \$5,000 grant for their work to enhance the quality and scope of educational opportunities for all students of Whitefish Public Schools.



DORIS SCHUMM COMMUNITY SPIRIT AWARD \$5,000

BOB MARSHALL WILDERNESS FOUNDATION received the Doris Schumm Community Spirit Award and an accompanying \$5,000 grant for their work to connect people with America's wilderness heritage by providing access to and stewardship of the Bob Marshall Wilderness Complex.



CONNIE HECKATHORN CHEERS FOR VOLUNTEERS AWARD \$2,500

Whitefish Community Foundation's three living founders, **ROX HICKS, MIKE JENSON AND JOHN KRAMER**, received the Connie Heckathorn Cheers for Volunteers Award in honor of their work, alongside Heckathorn and Dave Stewart, to create a hub for philanthropic giving in the Flathead Valley that has connected donors with local nonprofits for the past 25 years. A \$2,500 grant accompanied each award, which Rox directed to the Whitefish Dog Park in memory of her husband Hugh Rogers, Mike directed to Sparrow's Nest of NW MT, and John directed to Whitefish Education Foundation.



CORPORATE CITIZENSHIP AWARD \$2,500

THE DAILY INTER LAKE received the Corporate Citizenship Award in recognition of their professional coverage of the critical work of nonprofits throughout the Flathead Valley and their dedication to connecting the community through local stories that build awareness and inspire generosity. A \$2,500 grant accompanied the award, which the Daily Inter Lake directed to Writing Coaches of Montana.



DONOR ADVISED FUNDS

WHAT IS A DONOR ADVISED FUND?

A Donor Advised Fund (DAF) is a charitable giving account designed to help families and individuals GIVE, GROW, and GRANT to support their favorite nonprofits.

HOW DOES A DONOR ADVISED FUND WORK?



GIVE

Donors establish a DAF through a minimum gift of \$5,000 and receive an immediate tax deduction.



GROW

Whitefish Community Foundation works with expert advisors to invest the fund based on the donor's giving timeline. Additional gifts to the DAF can be made at any time.



GRANT

Donors utilize Whitefish Community Foundation's online portal to request grants to any 501(c)(3) charity in the United States.

WHY OPEN A DONOR ADVISED FUND AT WHITEFISH COMMUNITY FOUNDATION?

Supporting your favorite nonprofits is quick and easy through Whitefish Community Foundation's online portal, where you can research charities, recommend grants, view your granting history, and download monthly statements. Whitefish Community Foundation can share our expertise on local nonprofits. Our fees match or beat corporate DAFs and best of all, they stay local and directly support our mission. Investment returns are in the top 10% of community foundations nationally.

\$47.3M
TOTAL DAF ASSETS

88
DONOR ADVISED FUNDS HELD AT WCF IN 2025

\$9.2M
AWARDED TO NONPROFITS IN 2025
AN 84% INCREASE OVER 2024

\$51.9M
AWARDED TO NONPROFITS THROUGH THE DAF PROGRAM SINCE 2000



MATT AND DEB BROOKS

CIRCLE OF GIVING MEMBERS, DONOR ADVISED FUND HOLDERS

After nearly three decades of marriage and a career rooted in service, Deb and Matt Brooks have carried a shared commitment to community wherever life has taken them. The two met at the U.S. Air Force Academy and built a life shaped by dedication. Matt served a 22-year career as a bomber pilot and commander, and Deb worked as a certified athletic trainer before focusing on raising their family. Today, that same sense of purpose guides their philanthropy.

Deb and Matt's connection to the Flathead Valley began while they were stationed in North Dakota. A winter train trip to Whitefish in 2016 followed by a return visit the following summer confirmed what they had felt the first time they arrived: this was a place where they wanted to put down roots. Deb and Matt purchased property soon after, drawn not only by the landscape, but by something deeper.

"What has made it feel like home is the people," they shared. "There's a genuine sense of pride and care for the community."

As they became more involved, they were struck by how engaged and committed residents are to improving life in the Flathead Valley. That spirit of participation inspired Deb and Matt to deepen their own involvement in the community, including their philanthropy. After initially working with a corporate Donor Advised Fund sponsor, they made the decision to move their DAF to Whitefish Community Foundation.

"Whitefish feels like home to us," they explained. "We wanted our giving to reflect that connection."

Partnering with a local community foundation transformed their experience. Through initiatives like the Great Fish Community Challenge and the Circle of Giving, they've seen firsthand how local generosity translates into real impact. Giving, they say, has become more personal. It is less about transactions and more about relationships and shared outcomes.

"You're not just writing a check," they said. "You're part of something that is actively improving the community around you."

Equally meaningful has been the accessibility and responsiveness of Whitefish Community Foundation's team. The ability to connect directly, ask questions, and receive thoughtful guidance has made their philanthropic journey both seamless and rewarding.

For those new to the Flathead Valley, their advice is simple: get involved. "Show up, learn what matters, and support the organizations doing the work," they said. "It doesn't have to be complicated."





LEGACY SOCIETY

The Legacy Society is a special group of donors who share a vision of providing for the needs of future generations through planned giving. Whitefish Community Foundation specializes in working with donors to benefit their favorite nonprofits both today and tomorrow.



Legacy Society donors can take advantage of numerous tools to leave a legacy, including a bequest in their will or trust. Whitefish Community Foundation ensures the funds are prudently invested and granted out according to the donor's wishes. Should you choose to include Whitefish Community Foundation in your will or other estate plans, we would be honored to know your intentions and have you as a member of our Legacy Society.

THANK YOU, LEGACY SOCIETY MEMBERS

- | | |
|----------------------------------|------------------------------------|
| Anonymous (5) | JeanAnne Swope and James L. Mecham |
| Carol and Richard Atkinson | Meislik Family |
| Mary VanBuskirk and Roger Barber | Michael H. Meszaros * |
| Sharlot Battin | Blake Reese Memorial Endowment |
| Barbara Boorman | Dean A. Robbins (Wiley Homestead) |
| Dorothy and Luther Campbell | M & S Schmidt |
| Jane Kollmeyer and Terry Chute | Doris Schumm * |
| Anne and John Collins | Janna and Jamie Shennan |
| Cynthia Granmo | Lisa and Jim Stack |
| Connie and Jake Heckathorn * | David Stewart * |
| Joaquenia and Klaus Heinrich | Mary Jane and Russ Street * |
| Thomas A. Hughes III | Gail Cleveland and Bruce Tannehill |
| Barbara and Mike Jenson | Kathleen Grant and Mark Voelker |
| Ann and Paul Jeremiassen | Lori and Robb Voyles |
| Herb Kameon * | Ardy and Steve Whisler |
| Steve Knox | Susan and John Witt |
| Jon McBride and John Kramer Jr. | |
| Mignon and Jay Latimer | *Deceased |



STEVE
KNOX
LEGACY SOCIETY

For decades, Steve Knox has worked to make sure local kids have the chance to ski.

When Steve came to Whitefish in 1995 to organize Big Mountain's first freestyle ski team, he noticed financial barriers were limiting participation. Many Montana working families simply couldn't afford competitive ski and snowboard programs.

"I became an advocate for the underdog," Steve said. "There were some really talented young skiers who were being left out, and that just was wrong. It became a top priority to make funds available to those who wouldn't otherwise be able to participate."

That belief led Steve to spearhead the founding of Whitefish Freestyle Inc., a nonprofit that provides scholarships to members of Whitefish Mountain Resort's freestyle ski and snowboard team.

Over the years, the program has helped young athletes train, compete, and build confidence on the mountain and in life. Several athletes have gone on to compete at the highest level. One even stood on the Olympic stage, a reminder of what can happen when opportunity meets talent.

"You don't have to be ultra-wealthy to make an impact."

As Steve began thinking about the future, he wanted to continue to support local kids who could use help and wanted the chance to thrive. Through his estate plans, Steve has established a Legacy Endowment Fund at Whitefish Community Foundation that will support youth-focused nonprofits in the Flathead Valley after his lifetime. The fund will benefit specific organizations, including Whitefish Freestyle Inc., that provide life-changing opportunities, mentorship, and experiences for local at-risk youth.

"You don't have to be ultra-wealthy to make an impact," Steve said. "I am just an active guy who skis most afternoons and was fortunate enough to also own and run a small business in Whitefish for close to 30 years. As I approach retirement, I trust the Foundation is a perfect fit to create my personal philanthropic legacy."

For Steve, it's a natural extension of the work he started years ago on the mountain. A way to keep supporting the next generation of local kids, long after his last run.





NONPROFIT DEVELOPMENT PROGRAM (NpDP)



Whitefish Community Foundation's Nonprofit Development Program (NpDP) helps Flathead Valley organizations improve their governance, fiscal management, fundraising, outreach, and strategic planning through free workshops and networking opportunities, personalized coaching, and capacity-building grants.

13
LEARNING
OPPORTUNITIES IN 2025

125+
NONPROFITS SERVED IN 2025

11
CAPACITY-BUILDING
GRANTS IN 2025

500+
WCF HOURS PROVIDING
ONE-TO-ONE NONPROFIT
COACHING IN 2025

2025 NONPROFIT WORKSHOPS:

- Guarding the Mission: Duties Every Board Must Uphold
- Design with Impact
- Growing Your Endowment
- Chaos to Clarity: Social Media Best Practices
- Treasurer's Bootcamp
- Legal Responsibilities of Serving on a Nonprofit Board
- Grow Your Gifts
- Reframing Your Money Story
- Fully Funded! How to Wow Our Grants Committee

CAPACITY BUILDING IMPACT

BOB MARSHALL WILDERNESS FOUNDATION

Every summer in the "Bob," volunteers with the Bob Marshall Wilderness Foundation haul crosscut saws down rugged trails, clear fallen timber, repair historic ranger stations and fight invasive weeds. Their work protects one of Montana's most treasured landscapes and ensures future generations can experience its wild beauty.

Last year, the organization undertook a comprehensive strategic planning process to clarify priorities and prepare for a strong future.

A capacity-building grant from Whitefish Community Foundation helped cover nearly half the cost of a professional organizational assessment and strategic plan. "Were it not for the grant, we might have settled for a lower standard or diverted funds away from programming," Bob Marshall Wilderness Foundation Executive Director Cliff Kipp shared.

WEST SHORE FOOD BANK

Until recently, West Shore Food Bank tracked its supporters the old-fashioned way, with spreadsheets and handwritten notes. It worked, but just barely. As the need for food assistance grew along the west shore of Flathead Lake, so did the complexity of keeping donors informed and engaged.

"We recognized the need for a better way to share our programs, progress, and impact with the supporters who make our work possible," Board Member Julia Sunde said.

With a capacity-building grant from Whitefish Community Foundation to purchase donor database software, the team can now communicate with donors more consistently and efficiently, freeing up more time and energy to focus on what matters most: fighting hunger.



SCHOLARSHIPS MAKING FUTURES BRIGHTER TOGETHER



Whitefish Community Foundation is pleased to work with businesses and families to establish scholarships that help young adults reach their educational goals. The Foundation professionally manages all aspects of the process from start to finish. We help donors develop eligibility criteria for their scholarship, guide students through the application process, and invest the funds to preserve value and foster growth.

12
STUDENTS RECEIVING
SCHOLARSHIPS IN 2025

\$35,600
AWARDED IN 2025

ACTIVE SCHOLARSHIP FUNDS:

- Dorothy and Luther Campbell Scholarship
- Glacier Restaurant Group-R.I.S.E. Scholarship
- Jean Atkinson Driggers Scholarship
- Kiita Foundation Scholarship
- Montana Coffee Traders Scholarship



SCHOLARSHIP IMPACT

"THE KIITA FOUNDATION SCHOLARSHIP has had a meaningful impact on both my academic journey and personal growth. It has eased the financial stress of paying for college at the University of Montana Western, allowing me to focus on what matters most—learning. Because of that support, I've been able to maintain a strong GPA and feel more confident in my studies.

The scholarship has also opened the door to service trips to Mexico, where I stepped outside my comfort zone and experienced firsthand the importance of community, service, and leadership. These experiences strengthened my commitment to giving back and deepened my appreciation for the opportunities I've been given.

At Montana Western, I'm pursuing a major in Business Administration with a minor in Small Business Management. Along the way, I've had valuable opportunities to connect with fellow students, professors, and potential employers. The support from the Kiita Foundation Scholarship continues to motivate me to work hard and make the most of my college experience, and I look forward to using what I've learned to positively impact others in the future."

-Aiden Weisz, Scholarship Recipient



MONTANA ENDOWMENT TAX CREDIT

\$1,363,564

TAX CREDIT GIFTS
RECEIVED IN 2025

147

METC GIFTS
RECEIVED SINCE 2012

The **MONTANA ENDOWMENT TAX CREDIT (METC)** helps build nonprofit endowment funds by allowing donors to pay less in Montana state income taxes when they make a planned gift to a qualified Montana charitable endowment, such as any of the 53 endowment funds held at Whitefish Community Foundation. In 2025, 31 donors saved \$529,000 in Montana state income taxes by investing over \$1.3 million in nonprofit endowment funds held at the Foundation. Since 2012, more than \$5.5 million has been raised for nonprofit endowments through the METC program at Whitefish Community Foundation.

	FOR INDIVIDUALS	FOR BUSINESSES
TYPE OF GIFT	Planned Gift (Deferred Gift Annuity) of cash or appreciated securities. <i>Minimum gift size \$10,000.</i>	Direct gift of cash or appreciated securities. <i>No minimum gift size.</i>
AMOUNT OF MONTANA ENDOWMENT TAX CREDIT	40% of the initial gift, up to max credit of \$15,000 per taxpayer (\$30,000 for joint filers). <i>The remaining gift amount provides a federal tax deduction.</i>	20% of gift amount, up to max credit of \$15,000. <i>The remaining gift amount provides a federal tax deduction.</i>



BRETT AND SUE
OEMICHEN

METC DONORS, CIRCLE OF GIVING DONORS

Brett and Sue Oemichen's connection to Montana began long before they called the Flathead Valley home. The couple, both originally from western Minnesota, honeymooned in Glacier National Park nearly 50 years ago, a trip that left a lasting impression.

Brett built a career in agricultural crop protection and Sue worked as a registered nurse. Their careers took them across the Midwest and Pacific Northwest before they retired in 2010.

Nearly a decade later, they returned to the place that had stayed in their hearts. While visiting the Flathead Valley in 2019, they spent their last evening at the Kandahar Lodge on Big Mountain. Over dinner at the Bierstube, they watched the alpenglow settle across the mountains and knew they had found their next home.

Today, the Oemichens are deeply engaged in a variety of community efforts. Sue helped reinvigorate the Big Mountain Community Fire Wise program and guided it through the process of becoming its own nonprofit organization focused on wildfire risk education and mitigation. Brett volunteers weekly during the summer in Glacier National Park, greeting visitors and sharing information at the Trail of the Cedars and Avalanche Lake trailhead.

Their commitment to community also extends to philanthropy. As they approached age 70½, the couple began exploring tax-advantaged ways to support charitable causes. With guidance from their accountant and the team at Whitefish Community Foundation, they began making Qualified Charitable Distributions from their IRA to support local nonprofits they care about.

They also utilized the Montana Endowment Tax Credit by donating appreciated stock to support Whitefish Community Foundation's endowment. "We're very mindful that the Foundation has to sustain itself," Brett said. "Supporting the endowment keeps the giving going on and on."

In addition, Brett and Sue are new members of the Circle of Giving, joining other donors who pool their resources to support nonprofit organizations throughout the Flathead Valley.

"We've been very fortunate in our working lives," Sue said. "Now it's nice to carry that forward and help support the community we're part of."





BUILDING ENDOWMENTS FOR NONPROFIT SUSTAINABILITY

\$31.6M
TOTAL ENDOWED ASSETS

\$4.8M
DISTRIBUTIONS TO NONPROFITS SINCE 2014

\$719,632
ENDOWMENT DISTRIBUTIONS IN 2025

53
ENDOWMENTS HELD BY WCF

Endowments offer nonprofits an annual distribution to support critical operations and programs. As an endowment grows over time, the annual distribution also grows. Holding an endowment allows a nonprofit to have a diversified revenue source and builds long-term sustainability for the organization.

NONPROFIT ENDOWMENTS HELD BY WCF:

- | | |
|--|---|
| Abbie Shelter Endowment | Land to Hand Endowment |
| Alpine Theatre Project Endowment | Lighthouse Christian Home & Services Endowment |
| Back Country Horsemen Endowment | Logan Health Foundation-Whitefish Endowment |
| Bigfork Food Bank Endowment | Montana History & Civics Education Endowment |
| Bob Marshall Wilderness Foundation Endowment | Nate Chute Foundation Endowment |
| CASA for Kids Endowment | Nonprofit Development Partnership Endowment |
| Center for Restorative Youth Justice Endowment | North Valley Food Bank Endowment |
| Child Bridge Endowment | North Valley Music School Endowment |
| DREAM Adaptive Recreation Endowment | North Valley Music School Youth Scholarship Endowment |
| FAST Blackfeet Endowment | Patrol Fund Endowment |
| First Presbyterian Church Endowment | Shepherd's Hand Endowment |
| Flathead Audubon Society Endowment | Smith Fields Endowment |
| Flathead Food Bank Endowment | Somers Beach State Park Endowment |
| Flathead Land Trust Endowment | Sparrow's Nest of NW MT Endowment |
| Flathead Shelter Friends Endowment | Stumptown Art Studio Endowment |
| Flathead Warming Center Endowment | Stumptown Historical Society Endowment |
| Foy's to Blacktail Trail Maintenance Endowment | The WAVE Endowment |
| Glacier Institute Endowment | Whitefish Community Foundation Endowment |
| Glacier National Park Conservancy Endowment | Whitefish Community Library Endowment |
| Glacier Nordic Club Endowment | Whitefish Dog Park Endowment |
| Glacier Symphony and Chorale Endowment | Whitefish Education Foundation Endowment |
| Habitat for Humanity Endowment | Whitefish Legacy Center Endowment |
| Hockaday Museum of Art Endowment | Whitefish Library Association Endowment |
| Human Therapy on Horseback Endowment | Whitefish Performing Arts Center Endowment |
| Humane Society of NW MT Endowment | Whitefish Theatre Company Endowment |
| Immanuel Foundation Endowment | Whitefish Trail Endowment |
| Kalispell Education Foundation Endowment | |

"For more than four decades, the Glacier Symphony Orchestra & Chorale has been honored to serve the Flathead Valley with music that inspires, educates, and brings our community together. As we prepare to enter our 44th season, we reflect with deep gratitude on the partnerships that make our work possible—especially our endowment held at Whitefish Community Foundation. Our endowment is essential to the long-term strength and sustainability of our organization. Through generous legacy gifts and ongoing community support, this fund continues to grow – providing dependable annual distributions that directly support our programs and operations. It is this thoughtful investment in the future that allows us not only to sustain our mission, but to expand it."

-Tony Wise, Executive Director of Glacier Symphony Orchestra & Chorale



CORPORATE PHILANTHROPY GIVING BACK TO OUR COMMUNITY

WHITEFISH MOUNTAIN RESORT

\$1.7M
AWARDED TO BENEFIT LOCAL NONPROFITS SINCE 2002

\$131,409
SUPPORTED LOCAL NONPROFITS IN 2025

\$25K
TO DREAM ADAPTIVE RECREATION FOR NEW HEADQUARTERS BUILDING PROJECT

\$47,409
SUPPORTED FLATHEAD VALLEY 5TH GRADE SKI PASS PROGRAM AND DREAM ADAPTIVE RECREATION'S WINTER PROGRAMS DURING 2024-25 SEASON

52
NUMBER OF GRANTS AWARDED TO LOCAL NONPROFITS IN 2025

The **PATRON SKI PASS PROGRAM** is a charitable giving partnership between Whitefish Mountain Resort and Whitefish Community Foundation. Program proceeds benefit the work of local nonprofits and Whitefish Community Foundation.

Thank you, Whitefish Mountain Resort and Patron Ski Pass Program members, for your support of Flathead Valley nonprofits!



WHITEFISH LAKE GOLF CLUB

WHITEFISH LAKE GOLF CLUB

The **PATRON GOLF PASS PROGRAM** is a charitable giving partnership between Whitefish Lake Golf Club and Whitefish Community Foundation. Since inception in 2007, the program has raised over **\$236,000** from the sale of golf passes to support the Foundation's charitable work to benefit our local communities.

We are grateful to Whitefish Lake Golf Club, Whitefish Lake Restaurant, the Pro Shop, and program members for your continued support!



2025

2,415
NUMBER OF
GRANTS AWARDED

\$8,995
AVERAGE GRANT
AMOUNT

414
NUMBER OF NONPROFIT
RECIPIENTS

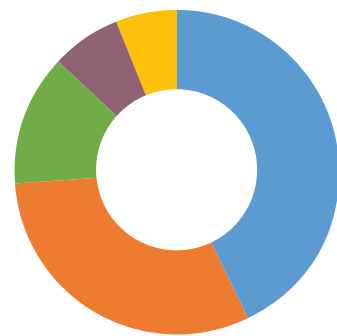
\$51,887
AVERAGE PER
NONPROFIT

BY THE NUMBERS

COMPOSITION OF ASSETS 2025 YEAR END

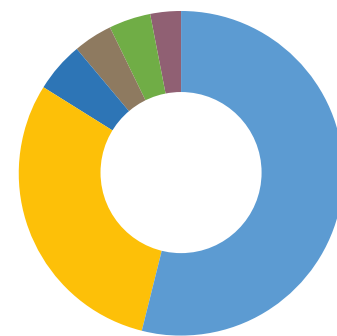
As of December 31	2025	2024
Total Assets	\$88,429,895	\$67,617,402
Total Contributions	\$34,582,340	\$17,012,895
Total Grant Distributions	\$21,481,125	\$15,092,559

**GRANT DISTRIBUTIONS
BY FUND TYPE**



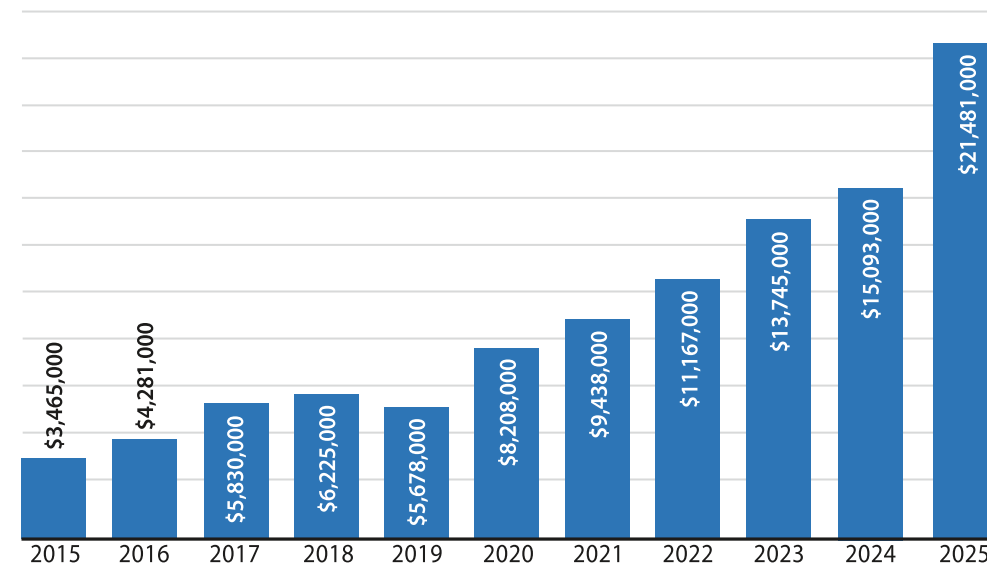
- Donor Advised Funds, 43%
- Great Fish Designated Funds, 31%
- WCF Grant Programs, 13%
- Designated Funds, 7%
- Endowment Funds, 6%

**TOTAL ASSETS
BY FUND TYPE**



- Advised, 54%
- Endowed, 30%
- Annuity, 5%
- Designated, 4%
- WCF Grants, 4%
- Operating, 3%

GROWTH IN GRANTING



FINANCIAL STEWARDSHIP

Prudent asset management supports strong grant programs capable of meeting community needs long into the future. Our Investment Committee and staff work closely with nationally acclaimed Mason Investment Advisory Services to ensure that all assets entrusted to us are invested in a diverse portfolio designed to maximize returns while minimizing risk and volatility.

INVESTMENT COMMITTEE

- G. Stacy Smith, *Chair*
- John Collins
- Brenden Craig
- Greg Garrison
- Hank Ricklefs
- Jamie Shennan
- Ardy Whisler

FINANCIAL MANAGERS DISCLOSURE

Investment Manager:
Mason Investment Advisory Services

Custodian: Pershing, LLC

CPA: Sallie Brown,
JCCS, CPAs, PC, Whitefish

Auditor: Tony Vanorny,
JCCS, CPAs, PC, Kalispell

Whitefish Community Foundation operates under section 501(c)(3) of the Internal Revenue code as a public charity I.D. #81-0533002. Review annual 990 report at whitefishcommunityfoundation.org

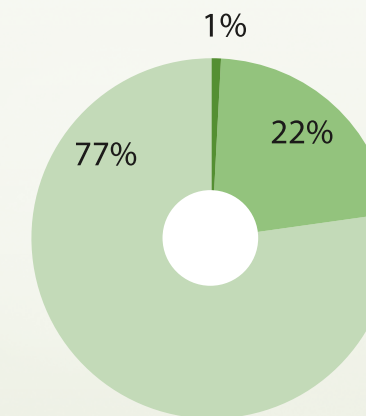
Whitefish Community Foundation recommends that you seek advice from your tax advisor and/or attorney for all your charitable giving.

INVESTMENT RETURNS (ANNUALIZED + NET OF FEES)

ENDING DECEMBER 31, 2025

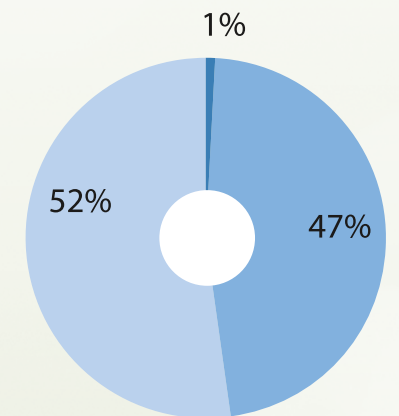
	1-YR	3-YR	5-YR
Long Term Growth	16.29%	13.38%	8.75%
Annuity	15.56%	12.95%	8.50%
Balanced	12.73%	10.24%	6.20%
Capital Preservation	3.9%	4.48%	2.89%

**LONG-TERM GROWTH
ALLOCATION**



- CASH
- FIXED INCOME
- EQUITY

**BALANCED POOL
ALLOCATION**



- CASH
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brings together donors and nonprofits
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