



BOARD OF DIRECTORS

May Lofgreen	Chairman
Mike Trevino	Vice Chairman
Bob Spurck	Secretary/Treasurer
Ed Clements	Director
Chelsea Schrimpf	Director

CHARITIES SUPPORTED IN 2022

2022 Donation Partners

- Senior Access (Q1)
- NAMI (Q2)
- The SAFE Alliance (Q3)
- Honor Flight Austin (Q4)

Other Charities

- Fort Worth Stock Show Scholarship Fund

Chairman's Report | May Lofgreen

In 2022 the United Heritage Charity Foundation has been diligent in furthering its mission of supporting organizations that work to create a positive impact in their communities. Changes were seen throughout the year for the foundation. From new members on the Board of Directors, to updating our areas of focus, each change has been made with the goal of serving our communities to the best of our abilities. As the Foundation continues to evolve, we look forward to working with deserving organizations throughout Central and East Texas.

I am exceedingly proud of all of the accomplishments that the Foundation achieved in 2022 and appreciate all of the dedicated members of the Board who have worked tirelessly to push the Foundation to new heights. Towards the end of 2022, I decided to step down as Chairman of the Board after almost two decades of service. Leading this organization and working with our communities has forged lasting memories, and I will forever be grateful for the opportunity to play such a large role in the positive impact the Foundation has made. As we look to 2023, I know the Board will continue our mission and make our communities a better place to live, work and attend school.

2022 Donation Partnerships

The United Heritage Charity Foundation partnered with four local organizations throughout 2022. The organizations selected for each quarter aligned with one or more of the Foundation's Areas of Focus. During the first quarter of 2022, the Foundation partnered with Senior Access to provide transportation and essential services to seniors over the age of 60. In quarter two, the Foundation worked with NAMI (National Alliance of Mental Illness) Central Texas to promote mental health resources and recovery. In quarter three, the Foundation partnered with The SAFE (Stop Abuse for Everyone) Alliance to combat violence and abuse in the community. In the last quarter of 2022, the Foundation started working with Honor Flight Austin to provide veterans with a trip of a lifetime to visit memorials in Washington D.C. that are dedicated to the service and sacrifices veterans have made. This flight will take place in 2023. The Charity Foundation is proud of the work that was completed during these partnerships and the relationships that were built with each organization.

Senior Access

Senior Access is a local organization that assists seniors over the age of 60 by providing transportation and essential services. Founded in 1993, Senior Access currently supports over 1,300 senior clients located in the Round Rock, Pflugerville, Hutto, East Austin, and Manor areas of Central Texas. The organization connects volunteer drivers with seniors to take them to doctor appointments, go grocery shopping, and other helpful services. Throughout January to March of 2022, the Foundation and Senior Access came together to share a cohesive message that is tied to human services and promotes elderly assistance.



NAMI Central Texas

NAMI (National Alliance of Mental Illness) Central Texas's vision is to address mental illness as a health issue and provide systems and resources for those affected to achieve recovery. Founded in 1984, this organization supports communities in Travis, Williamson, Hays, Bastrop, Burnet, and Caldwell counties. During the months of April to June 2022, the Charity Foundation helped them as they assist individuals and families who are impacted in Central Texas, and as they continue to make a difference in the way people see mental health.



The SAFE Alliance

As a long-standing and respected human services agency in Austin, SAFE (Stop Abuse For Everyone) Alliance was formed in 2015 as a merger between Austin Children's Shelter and SafePlace. The SAFE Alliance exists to serve the survivors of abuse and help to create a safe community through advocacy, education and prevention resources. During the months of July through September 2022, the Charity Foundation helped them as they continue to provide free services to combat violence and abuse in the community.



Honor Flight Austin

The Foundation partnered with Honor Flight Austin from October to December 2022 when the focus was military and veteran assistance. Honor Flight Austin is dedicated to making sure that Austin-area veterans are able to visit the memorials that are dedicated to their service and sacrifice, at no cost. Their flights are a trip of a lifetime for many veterans and they have transported thousands of men and women to Washington D.C.



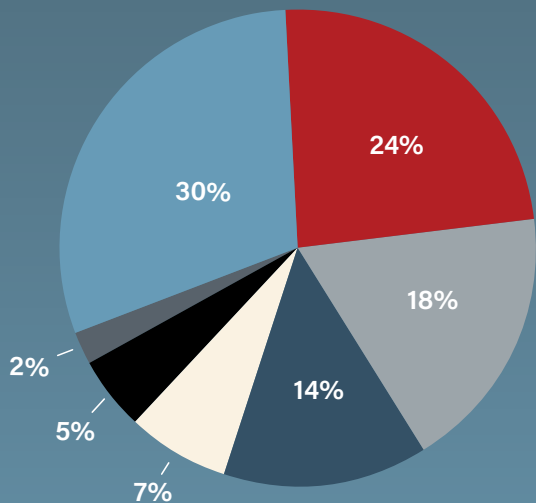
Scholarship Winner | Sandali Srivastava

The United Heritage Charity Foundation awards annual college scholarship funds to high school seniors who best exemplify the credit union philosophy of “People Helping People.” In 2022, Sandali Srivastava was selected as the recipient of the \$5,000 United Heritage H. Ralph Wilburn Memorial Scholarship, due to her outstanding community service, extracurricular activities, and academic performance.



2022 Auto Raffle | John Deyoung

In 2022, the United Heritage Charity Foundation, raised a total of \$78,780 through the Auto Raffle. Thank you to all who participated, as funds raised through raffle ticket sales help make the Charity Foundation’s charitable objectives possible. Congratulations to our Auto Raffle winner, John Deyoung, who drove home a new Toyota RAV4 Hybrid XSE!



Donations by Category | 2003 - 2022

Family & Children	\$	668,813
Human Services	\$	525,334
Healthcare	\$	391,843
Education	\$	314,176
Military / Veterans Assistance*	\$	162,550
Credit Union Foundations	\$	107,575
Other	\$	42,857

Totals \$ 2,213,148

* The Honor Flight donation was included in this total as it was approved in 2022. It will be distributed in 2023.

2022 Financials

Beginning Funds	\$	138,065.25
Contributions Received	\$	124,785.16
Donations Made	\$	75,000.00
Operational Expenses	\$	33,495.93
Ending Funds	\$	154,354.48