Financial Stewardship

FINANCIAL INFORMATION

Finance and Investment Committee Oversight

Members of the Community Foundation's Finance and Investment Committee have extensive experience in business, investments, and financial services. The committee sets the investment strategy, hires outside professional managers, and monitors investment performance against industry benchmarks. The Foundation's assets are managed by investment managers who are retained for their proven long-term investment results and expertise in specific asset classes or market sectors. The investment results of each individual manager are regularly monitored by the Finance and Investment Committee and Prime Buchholz, LLC (see below). The performance of each manager is measured against a specific benchmark appropriate to the asset class it manages.

Investment Advisors

The Community Foundation benefits from the expert counsel of Prime Buchholz, LLC. Prime Buchholz specializes in working with nonprofits, and provides investment advice to a number of other community foundations across the country.

Investment Strategy

The Community Foundation's investment strategy calls for a portfolio that is diversified across U.S. domestic and global asset classes. A diversified portfolio reduces the impact of individual market volatility and helps to control risk. In addition, the Foundation uses multiple investment managers in some asset classes, a diversification technique that further reduces risk.

2026-2027 FINANCE COMMITTEE

Mark R. Holtzman, *Treasurer*

Robert F. Audi, CPA

Jean Bedell, CPA/PFS, CFP

Christopher L. Cimijotti, CPA

Belinda Hilton

Walter Klisiewcz, CFP

Alicia Lasch

Eileen McLoughlin

Robert S. Reynolds, Esq.

Alex Zhang, CPA

John Eberle, President & CEO

Terry Mariano, Chief Financial Officer

Partners in Giving

Guided by the needs of our region and accountable to our community, we partner with generous individuals, families, foundations, and corporations who share a commitment to strengthening our community. For more than 50 years, the Foundation has been dedicated to improving the lives of our neighbors.

GIVE

Since 1968, individuals and families have put their trust in the Community Foundation to support their charitable giving. As stewards of these legacies, the Foundation strives to preserve the donors' intent and build a pool of charitable capital to support innovative strategies to address our region's changing needs.

GIVE

The Community Foundation provides a simple and highly personal approach to giving. We help to make giving convenient and rewarding by listening to your goals and offering flexible choices that best fit your unique situation.

GRANT

The Community Foundation's grantmaking and initiatives fuel programs that make a positive difference in the lives of Capital Region residents. We are committed to investing in organizations and programs that serve the common good.

LEAD

Harnessing the power of collaboration, the Community Foundation works to tackle our community's most pressing issues. We work to leverage resources to achieve ambitious goals with public, nonprofit and private sector partners toward a greater collective impact.

Working with Professional Advisors

The Community Foundation considers attorneys, accountants, financial advisors, investment managers, insurance agents and other professionals to be our partners in the charitable giving process.

The Professional Advisor Council helps with the Foundation's outreach to professionals in the fields of law, accounting, insurance, and financial planning so that they may become a referral source of charitable clients when appropriate.

PROFESSIONAL ADVISOR COUNCIL

Jean Bedell, CPA/PFS, CFP | *Co-Chair*
The Bonadio Group

Robert Reynolds, Esq. | *Co-Chair*
Whiteman, Osterman & Hanna, LLP

Jessica Backer Brand, Esq.
Vella Carbone & Vinson, LLP

Anthony J. Capobianco, ChFC, CLU
Capobianco Financial Advisors

Christina Capobianco, CFP
Capobianco Financial Advisors

Christopher Cimijotti, CPA
MMB & Co.

Louis D'Angelo, CFP
Albany Financial Group

Katherine Dievendorf, Esq.
The Meliora Firm

Steven Egna, ASA, CM&AA
Valuation Resource Group

Megan Harris-Pero, Esq.
Harris-Pero Law Firm, PLLC

Katherine Hart Crain, Esq.
Couch White, LLP

Audra Higgins
Curran Wealth Management

Charlie Joseph, CAP
Retired, Janney Montgomery

Alicia Lasch
Cerity Partners

Amy O'Connor, Esq.
Whiteman Osterman & Hanna, LLP

William Pfeiffer, Esq.
Pfeiffer Law Firm

Louis Pierro, Esq.
Pierro, Connor & Strauss, LLC

Jeffrey Rosenbaum, CPA
Ayco, A Goldman Sachs Company

Ann Sharpe, Esq.
Ballston Spa National Bank

Beth van Bladel, CPA
BST & Co.