By now, the contours of our story are well known. We launched Unite Forever—the first endowment campaign in the history of United Way of Metropolitan Dallas—with the goal of reaching our $100 million goal in 2025 as the apex of our Centennial celebration. But as a community of change-seekers embracing the Live United movement, we came together in support of the North Texas community to reach our $100 million goal three years early and then—for good measure—topped this milestone with another $5 million to create even greater impact for generations to come. While the outlines of this story are known, the details of the story—the color, characters and commitment that are so unique to North Texas—are what this report is all about.

Inside these pages you’ll learn more about the legendary civic leaders who gave us the confidence and support to dream big—and achieve bigger—through the Unite Forever campaign. Legacy leaders like Ruth Sharp Altshuler, Margot Perot, Mary Anne Sammons Cree and Caroline Rose Hunt, who inspired others in service of the community they loved. And we highlight and pay tribute to the many families, next-generation and new United Way supporters who created a legacy that will benefit Dallas and the growing region for decades to come.

You’ll also read more about the tremendous impact that your support has enabled United Way of Metropolitan Dallas to make in education, income and health, the building blocks of opportunity that create the potential for every citizen of our region to thrive. And equally important, you’ll read more about our collective impact in social innovation, which allows us to invest in new solutions to existing challenges while expanding our community of civic, corporate and philanthropic partners. Even as we celebrate this achievement and the people who made it happen, it’s also important to recognize the seven years of hard work it took to exceed our goals. To our vice chairs and United Way Board and Foundation Board members, and to all of you who believe in United Way and the mission—we thank you. For generations to come, the North Texas community will be the grateful beneficiary of your generosity. We extend our sincere thanks.

Mary Templeton and Ed Galante
Unite Forever Campaign Co-chairs
Our Mission: We Change Lives

At United Way of Metropolitan Dallas, we unite the community to create opportunity and access for all North Texans to thrive.

We bring together the corporate, philanthropic, education, civic and nonprofit sectors, as well as the community as a whole, to create meaningful, lasting impact in the areas of education, income and health. Our vision is a North Texas where all students graduate prepared for success in college or on the job, all local families achieve financial stability and all of our neighbors can access the health resources they need to live longer, healthier lives.

About the United Way Foundation

Established in 1999, the United Way Foundation of Metropolitan Dallas provides a permanent source of funding, separate from our annual campaign initiatives, to support the programs and activities of United Way of Metropolitan Dallas.

The United Way Foundation enables donors to invest in the long-term future of United Way of Metropolitan Dallas, which ensures our organization has the funding required to improve access to education, income and health for generations to come.
Thank you to our Campaign Leadership

I continue to be inspired and amazed by the dedication, passion and generosity of our Unite Forever campaign chairs, vice chairs and honorary chairs who led this campaign for seven years. From the earliest days of the campaign, through the uncertainty of the pandemic and to the celebration of an unprecedented achievement—they each had an unwavering focus on achieving an audacious goal. Thanks to their leadership, generations of North Texans will enjoy a more equitable community, greater opportunity and improved access to education, income and health.

Terri West, Chair, United Way Foundation of Metropolitan Dallas Board

$100 million was a bold goal for United Way, indeed for any nonprofit organization. Unite Forever is the first endowment campaign for United Way of Dallas and—with the help of our donors, as well as our dedicated leaders and vice chairs—the campaign soared.

Mary Templeton, Unite Forever Campaign Co-Chair

From the very start, Ed Galante was instrumental to the success of the Unite Forever campaign. He served as co-chair and chief architect of Unite Forever, and early on, he generously invested $1 million to help seed the campaign. With seemingly endless vision, energy and enthusiasm, he helped United Way and our supporters cross the finish line well ahead of goal and three years ahead of schedule—and he even donated additional funds to match Unite Forever life insurance policies.

Galante has selflessly served in almost every major volunteer leadership role at United Way of Metropolitan Dallas, including on both the United Way and the United Way Foundation boards. We were proud to honor Galante with the J. Erik Jonsson Award—the highest honor bestowed by United Way—in 2022 during our celebration for the close of the campaign.

Edward G. Galante, Unite Forever Campaign Co-Chair

Future leaders of United Way of Metropolitan Dallas, volunteers and staff, and generations of North Texans to come will appreciate what this group and this organization has achieved. Most importantly, our community will benefit from the true impact.

Edward G. Galante, Unite Forever Campaign Co-Chair
Unite Forever Campaign Leadership

CAMPAIGN CO-CHAIRS
Mary Templeton and Ed Galante

HOONATORY CO-CHAIRS
Ruth Sharp Altshuler †
Mary Anne Sammons Cree †
Lydia Hill
Mary Templeton
Margaret McDermott †

VICE CHAIRS
Jim Adams
Jim Adams
Jim Bailey
Kelly H. Compton
Jennifer Connolly
Krisy Foss

VIDE CHAIRS
Jim Adkins
Jim Bailey
Kelly H. Compton
Jennifer Connolly
Krisy Foss

Lyne Fisher
Carla M. Fitzgerald
Carol March
Clint McDermough
Terri West
Steven Williams

Dave Rader
Carolyn Perot Rathjen
Julia Sanford-Carrington
Terri West
Steven Williams

L. Minyard
Margo and Ross Perot
Rogers Biadac
Linda Strickland
Margaret McDermott †

OFFICERS
Terri West, Chair
Texas Instruments Foundation
Clint McDermough, Vice Chair
KnowledgeWorks Foundation
Ernst & Young LLP (Retired)
Jennifer Sampson, President
Presidential and CEO
Chairman of Metropolitan Dallas
Ketan M., Secretary/Treasurer
Committee Chair
Texas Instruments (Retired)

MEMBERS
Troy Aikman
Aikman Enterprises
Millie Bradley
Exxon Mobil Corporation (Retired)
David Brown
Loncar Lyon Jenkins
Hal Brierley
The Brierley Group
Jim Burke
Vistra Corp.
David Critse
Kessler & Jenkins, LLP
Pete Cullinane
J.T. Morgan Private Bank
Thomas Cool
Messina
Mary Anne Sammons Cree † Community Volunteer
Jason Cunanan
Deloitte LLP
Curtis M. FitzGerald
Exxon Mobil (Retired)
Faye D. Fusses
Crescenzi (Retired)
Gary Furr
HII Healthcare
Edward G. Galante
Community Volunteer
Erin George
The Boston Consulting Group (BCG)
Carol Glendenning
Clark Hill Strasburger PLC
H. Ralph Hawkins
H2Q, Inc. (Retired)
Sally Higginbotham
The Hoglund Foundation
Caroline Rice Hart † Community Volunteer
Andrea Associati
The Good Foundation
Peter Kline
Axe Family Interests
David C. Rader
PepsiCo/Frito-Lay, Inc. (Retired)
Carolyn Perot Rathjen
The Perot Association
Philip Riter
Texas Instruments (Retired)
Debby Taylor
Citi (Retired)
Mary Templeton
Community Volunteer
Debra von Storch
Ernst & Young LLP (Retired)
W. Kelvin Walker
Dallas Citizens Council
Michael Weinkemper
Soni Associatu
Debra von Storch
PepsiCo Foods North America
J. Scott Wilson
Armed Forces LLP
Stacy Nahas
KPMG LLP
Blaine Nelson
BLW Nelson Group LLC
Ron Parker
PepsiCo/Frito-Lay, Inc. (Retired)
Michael Miller
Carrington Colman
Stanley A. Rubin
Commercial Metals Company (Retired)
Dave C. Rader
PepsiCo/Frito-Lay, Inc. (Retired)
Carolyn Perot Rathjen
The Perot Association
Carolyn Perot Rathjen
The Perot Association
Philip Riter
Texas Instruments (Retired)
Debby Taylor
Citi (Retired)
Mary Templeton
Community Volunteer
Debra von Storch
Ernst & Young LLP (Retired)
*
Current and prior board members since launch
† Denotes deceased
In 2014, United Way of Metropolitan Dallas and the United Way Foundation of Metropolitan Dallas launched the Unite Forever campaign—the first endowment campaign in the organization’s history—with a goal of raising $100 million in 10 years. The mission was simple and far-reaching: to grow permanent funding for United Way that will provide a more predictable, sustainable and stable future.

A successful campaign would allow our nonprofit to withstand annual economic fluctuations that can impact funding cycles, more frequently invest in strategic partnerships and creative ventures outside of the standard grants process, and fund new and emerging solutions for unseen future challenges.

Unite Forever quickly became a rallying cry for everyone who supported United Way’s mission. In May 2022, we celebrated closing the $100 million Unite Forever campaign three years earlier than planned. United Way’s endowment already provides more than $2.5 million annually to strategic community initiatives, benefiting more than 1.5 million North Texans every year through life-changing programs and services. The fund is poised to one day yield more than $5 million in annual earnings, at which point it will become the largest annual funding source for continuing United Way’s work—forever.

History of Unite Forever

Scan to read the full history of the Unite Forever campaign.

On United Way’s 90th anniversary, we kicked off the Unite Forever campaign with co-chairs Ruth Sharp Altshuler, Ed Galante and Roger Staubach.

The Dallas Morning News highlights the success of the campaign.

Shane and Hal Blankley made a $5 million gift to the campaign early on, then added a $500,000 incentive gift to provide matching funds for Unite Forever life insurance policies, giving other United Way supporters an opportunity to double their giving.

The Ruth Sharp Altshuler Basic Needs Fund was named in honor of one of United Way’s most dedicated beneficiaries.

In January 2019, United Way of Metropolitan Dallas renamed its Downtown Dallas headquarters the Mary Anne Sammons Cree Building in honor of one of our most committed longtime supporters.

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In 2016, Mary Templeton and the late Margaret McDermott teamed up for the naming rights to the top executive position at United Way of Metropolitan Dallas. The McDermott-Templeton chief executive will serve the North Texas community forever more.

The family of Caroline Rose Hunt made a lead $5 million gift in honor of their grandmother’s longstanding support of United Way and its Foundation.

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Remembering Ruth Sharp Altshuler

Legendary civic leader and United Way devotee Ruth Sharp Altshuler co-chaired the Unite Forever Campaign with Ed Galante and Roger Staubach, prior to her passing in 2017. Altshuler founded the United Way Tocqueville Society in 1986, was the recipient of United Way’s J. Erik Jonsson Award in 1989 and will forever be one of the honorary Chairs. She is an honorary lifetime board member.

Ruth’s Impact

In recognition of Altshuler’s unwavering commitment to ensure that critical assistance remains available for the most vulnerable populations in our community, she became the namesake of the Ruth Sharp Altshuler Basic Needs Fund, a portion of the endowment that ensures United Way can continue to respond to the needs of families through a regular and predictable funding stream year after year. Since its inception, the fund has distributed $913,167 and enabled 22 of our community impact partners to support North Texans’ most fundamental needs, including emergency shelter and food access. The Ruth Sharp Altshuler Basic Needs Fund “friends of Ruth” fundraising efforts were led by Kelly H. Compton, Caren Prothro and Carolyn Perot Rathjen.

The Unite Forever campaign was created to help make certain that United Way can continue to provide consistent funding for critical programs and respond to urgent community needs.”

Kelly H. Compton, Unite Forever Vice Chair

12 food pantries supported
9.4+ million pounds of food distributed
99,000 North Texans served
Margot Perot’s Capstone Gift

The Perot family is extremely important to United Way of Metropolitan Dallas and to the success of the Unite Forever Campaign. Margot Perot was one of the first donors to contribute a $1 million check to support Unite Forever to Ruth Sharp Altshuler.

Margot has served as a Tocqueville chair and as a founding member of the Tocqueville Society since 1986, and she and her late husband, Ross Sr., are also honorary campaign co-chairs. Her family continues the tradition of giving as daughter, Carolyn Perot Rathjen, serves on our United Way Foundation Board.

Moreover, Margot Perot contributed an additional $2 million capstone gift to help close the campaign—an incredibly generous investment that helped enable us to meet and exceed our $100 million goal three years ahead of our original deadline.
Mary Templeton and the late Margaret McDermott, widow of TI co-founder Eugene McDermott, teamed up to invest in the naming rights for the top executive position at United Way of Metropolitan Dallas in 2016. Two $1 million gifts from both Templetons and the Eugene McDermott Foundation endowed the McDermott-Templeton president and CEO designation at United Way Metropolitan Dallas—the position currently held by Jennifer Sampson. At the time, it was one of the largest contributions to the Unite Forever campaign.

Rich and Mary Templeton have a long history of supporting United Way Dallas with their time and resources. In 2013, Rich led the annual United Way Campaign, and in 2018-19, he and Mary co-chaired the annual campaign together—the first couple to do so. That year, the two helped raise more than $61 million to improve education, income and health in our community.

The couple was instrumental in the success of the Unite Forever endowment campaign. Mary Templeton took over as co-chair of the campaign when her good friend, Ruth Sharp Altshuler, passed away in 2017. “It is an honor to be chosen to serve in this role,” she said. “It was something Ruth believed in and to be able to complete what she started is really special.”

The Templeton family was one of the largest contributors to the campaign. Toward the end of the initiative—in the true spirit of Texas Instruments’ tradition and commitment to United Way—the Tempeltons teamed up with United Way Foundation Chair and chair of the Texas Instruments Foundation, Terri West, to rally a group of those affectionately known as “TIers.” These dedicated supporters joined forces to commit the remaining funds needed to reach the endowment goal.

"The leverage that the endowment will give United Way to address community impact funding is a legacy that I hope is continued not only by this Campaign, but the next one," explained Mary Templeton. "We hope that by having a generous, well-endowed United Way others will take notice, trust the organization and give, too. I am so grateful to all who have supported the Unite Forever Campaign."

Rich and I were so very happy to make that gift," Templeton said. "We are humbled to have our names connected to the McDermott. Margaret was an inspiration and one of the main reasons why our family is passionate about United Way Dallas and the work it does."
An Enduring Family Legacy

In the early days of the Unite Forever Campaign, leadership gifts from prominent local philanthropists helped the effort take root and flourish. In 2015, 19 grandchildren of Caroline Rose Hunt, daughter of the legendary wildcatter H.L. Hunt, made a lead $5 million gift in honor of their grandmother’s longstanding support of the United Way and its foundation. It was the largest gift to the campaign at the time.

“Our grandmother has been an extraordinary example of volunteerism and hard work,” said Haven Sands Heinrichs, trustee of The Rosewood Foundation. “To show our family’s love and appreciation for all she has done for United Way and the community, we [made] this legacy gift in her honor.”

Caroline Rose Hunt, who established The Rosewood Corporation, was involved with United Way for more than five decades, starting as a young UT graduate. Prior to her passing in 2018, she served in myriad leadership roles with United Way, including co-chair of the Tocqueville Giving Society, honorary vice-chair of the United Way Foundation and honorary Unite Forever chair. In recognition of her leadership, United Way presented her with our organization’s most prestigious honor, the J. Erik Jonsson Award, in 2003.

Today, Hunt’s legacy continues as granddaughter Julia Sands Cunningham serves as a Unite Forever vice chair and granddaughter Lauren Rose Sands is a member of the March Tocqueville Fellows. The Rosewood Foundation Director, Lynn Fisher, also volunteers for United Way as a Unite Forever vice chair and on the Women of Tocqueville Fund Advisory Council.

The Mary Anne Sammons Cree Building

Mary Anne Sammons Cree, a longtime United Way supporter and benefactor, and her family pledged a $10 million gift to the Unite Forever campaign in 2020. To honor the entire Cree family, United Way named its Downtown Dallas headquarters The Mary Anne Sammons Cree Building. At the time, the donation was the largest contribution to the campaign.

The family of Mary Anne Sammons Cree has a long-standing history of supporting United Way. Her mother, Rosine Smith Sammons, provided the first pro-bono public relations services for the Community Chest before it became United Way. She also went door-to-door soliciting funds for the organization, and Mary Anne often accompanied her. In 2018, Cree contributed $1 million to the Unite Forever campaign to honor Rosine and served on the board of directors for our foundation. Through the decades, the family’s support of United Way has provided countless resources to the community.

“Mary Anne Sammons Cree enriched the lives of generations of North Texans through her generous support of United Way of Metropolitan Dallas,” said Jennifer Sampson, McDermott-Templeton President and CEO, United Way of Metropolitan Dallas.

“Having my name on this building will forever associate me with an organization that has always meant so much to me and my family,” Cree said in 2020. “Something special happens when we as a community come together, united in a common goal. I’m incredibly honored by my family’s donation to a cause strengthening education, income and health, creating a brighter future for Dallas.”
In 2017, the Women of Tocqueville launched the Women of Tocqueville Fund for Women and Children, an endowment fund at the United Way Foundation of Metropolitan Dallas with a goal of providing targeted financial and skill-based investments in the areas of education, income and health for North Texas women and children.

“This marks the first-ever Women of Tocqueville-led fund at any United Way in the country,” said fund co-founder Kristy Faus. “As WOT members, empowering women and children are the pillars of our organization and are at the center of all we do.”

“During the pandemic, we had an opportunity to sit back, think and try to imagine what things were going to be like on the other side of it—who would be most hurt that we might partner with when the pandemic was over,” said fund co-founder Carol March. “We felt it was important that the fund lift up other women and elevate our purpose.”

The fund, which has raised more than $15 million, will be a source of permanent support and provide annual distributions for programs that create opportunity and access for women and children to thrive.

**INVESTMENTS TO DATE**

- **LiftFund Women’s Business Center - 2021:** With a $50,000 investment from the Women of Tocqueville, and a $50,000 match from Comerica Bank, LiftFund will provide microloans to female entrepreneurs in Southern Dallas so they can successfully grow their small businesses.

- **The United Way Social Innovation Incubator - 2022:** The fund invested $75,000 in this innovative program, which supports early-stage social ventures led and staffed by women and people of color who are working to implement new solutions in the areas of education, income and health.

The fund, which has raised more than $15 million, will be a source of permanent support and provide annual distributions for programs that create opportunity and access for women and children to thrive.

Thank you to our Women of Tocqueville Fund Founding Members

- Tarun and Shane Allen
- Mandy and Kyle Austin
- Ellen and Alan Barkar
- Lisa J. Bottle
- Millie and Allen Bradley
- Mandy and Jonathan Bradley
- Robbi Hay and David Hix
- Dee M. Brown
- Laura and Jason Downing
- Kristy and Raymond Faus
- Deborah and Robb Gobbins
- Cecy and Scott Gosch
- Jessica and Bart Hamlin
- Michelle and Matt Harton
- Scarlett Landry
- Nancy and Steve Luttrell
- Roberta Luttrell and Steve Aleniz
- Cynthia Malone
- Carol and Kevin March
- Gail McDonald and Jeffrey Murphy
- Cassandra and Bill McKinney
- Natalia and Jason Muncy
- Noona Newberry
- Pamela Osborne
- The Riddell Family
- Kate and Jeremie Rose
- The Rosewood Foundation
- Jennifer and Ed Sampson
- Jon and Mike Sharry
- Deb SoRelle and Brian Lindley
- Debra and Paul Tagg
- Karen Tavana
- Debbie and Marshall Taylor
- Michelle and Major Thomas
- Debra and Ken von Storch
- Margaret and Chad Windham
- Linda Yohe
- Rachel Ybarra

**Advisory Council**

The Women of Tocqueville Fund established the Women of Tocqueville Fund Advisory Council in 2020 to provide strategic direction, leadership and oversight for gift distributions.

**MEMBERS**

- Robbi Luxbacher — Chair
- Millie Bradley
- Kristy Faus
- Lynn Fisher
- Nancy Luttrell
- Carol March
- Cassandra McKinney
- Noona Newberry
- Pamela Osborne
- Tyler Riddell
- Janice Rose
- Deb SoRelle
- Linda Yohe
- Rachel Ybarra

**Members have contributed $250,000 or more to the Fund for Women and Children.**

**Founding members have contributed $250,000 or more to the Fund for Women and Children.**
Unite Forever Donors

$10,000,000 AND ABOVE
Mary Anne Sammons Cree
The Family of Mary Anne Cree

$7,500,000 AND ABOVE
Richard and Templeton Foundation
Mary and Richard Templeton

$5,000,000 AND ABOVE
Caroline Rose Hunt Foundation

$1,000,000 AND ABOVE
Western Bend Foundation
The Eugene McDermott Foundation

$500,000 - $249,999
The Riddell Family

$50,000 - $49,999
The Estate of Scott Lyons

$50,000 - $9,999
The Estate of Thomas Hunt

$5,000 - $4,999
The Estate of Mark E. Durant, Jr.

$1,000 - $999
The Estate of William J. Massey, Jr.

$500 - $999
The Estate of Thomas Hunt

$100 - $499
The Estate of Thomas Hunt

$50 - $99
The Estate of Thomas Hunt

$10 - $49
The Estate of Thomas Hunt

$5 - $9
The Estate of Thomas Hunt

$0 - $4
The Estate of Thomas Hunt

Event Donors

[List of event donors]

[Denotes deceased]
Our Impact: Education

Together, we improve access to education, which has the power to open doors and set students up for a lifetime of success. For North Texas children, a strong educational foundation supports higher incomes and access to health care, so we lead and invest in programs that ensure every student can thrive.

EARLY EDUCATION
Through programs like Once Upon a Month™, which delivers free age-appropriate children’s books to families every month, we ensure children are set up to succeed in school from an early age.

COLLEGE AND CAREER READINESS
With access to key knowledge, resources and investments like those delivered through Dollars for College, North Texas students are equipped to thrive after high school graduation, whether they pursue college or a career.

PARENT EMPOWERMENT
By empowering parents with vital skills and resources, programs like Healthy Outcomes Through Prevention & Early Support (HOPES) create a foundation upon which children can thrive.

Our Impact: Income

By supporting financial stability for all North Texans, we can positively impact nearly every part of a person’s life, enabling a family to plan for the future, access quality health care and support their children’s success in school. We lead and invest in programs that ensure our neighbors can get and keep better jobs, reduce debt and build savings.

WORKFORCE DEVELOPMENT
Programs such as Pathways to Work and Women in Construction deliver innovative, effective solutions for moving workers into good-paying jobs and building a strong pipeline of skilled employees.

HOUSING STABILITY
Together, we’re preventing homelessness and enabling more North Texans to stay in their homes by reducing the instance of evictions, supporting affordable housing, delivering rental and utility assistance, and more.

ECONOMIC MOBILITY
Through initiatives like Pathways to Economic Mobility, we provide a variety of resources and services that enable families to increase their savings, improve their credit scores, reduce debt and avoid predatory loans.
Our Impact: Health

Working with our partners and fellow change-seekers, we lead and invest in programs that improve health access for all North Texans. Good health creates a foundation that allows everyone to thrive, affecting everything from how well a child can learn to how much an adult will earn.

EXPANDED HEALTHCARE ACCESS
Through our Healthcare Navigators, the North Texas Healthcare Collaborative and other initiatives, we ensure that more of our neighbors have access to high-quality and affordable health insurance.

REDUCED CHILDHOOD HUNGER
Together, we’re fighting childhood hunger through the North Texas Summer & Supper Council and as part of our Southern Dallas Thrives initiative.

CHILD ABUSE PREVENTION
By matching parents and soon-to-be parents with trained home visitors, the Texas Home Visiting Program teaches positive parenting strategies that have been shown to prevent child abuse.

Social Innovation

We embrace social innovation in everything we do. Through the Social Innovation Incubator and Social Innovation Accelerator, we identify and amplify social entrepreneurs with creative new solutions to systemic challenges. With strategic initiatives such as Southern Dallas Thrives, we work closely with corporate partners to identify local challenges and develop bold new solutions that create a measurable impact.

NORTH TEXAS UNITED IMPACT FUND
This partnership with Draper Richards Kaplan Foundation creates lasting change by empowering North Texans to succeed through targeted, for-profit investments. The fund identifies and supports promising early-stage for-profit social enterprises working to drive positive outcomes in education, income and health. Any returns from these discrete social impact investments are recycled into the fund for future investments.
United Way of Metropolitan Dallas has developed strategies and technologies that will be models for United Ways around the country as they seek to identify solutions, engage volunteers and reshape the future. Diane and I are proud to be part of the Unite Forever campaign, and to take this step to perpetuate our support of United Way and its mission to fortify the fabric of this great city for all who live and work here.

- Hal Brierley, who with his wife Diane made a $500,000 campaign capstone gift to provide matching funds for United Way Life insurance policies

My husband and I and gave to the Fund because we knew that it would provide an opportunity for the women of North Texas to change the trajectory of their lives – not only for themselves, but for their families for generations to come.

- Michelle Thomas, Women of Tocqueville Fund Founding Member

My wife and I began supporting United Way annually in the 1970s. Nonprofits, like companies, need to invest in the future, and this is a major investment in the future of United Way and in our community.

- Stan Rabin, United Way Foundation Board member, who was an early contributor to the Unite Forever Campaign, pictured with his wife, Barbara

Dallas Cowboys legend Troy Aikman has ties with United Way that date back to his early football days, when he did promotional spots for the national organization. Over the decades, he’s become a dedicated supporter of United Way of Metropolitan Dallas, serving on both of our Boards of Directors, co-chairing our 90th Anniversary Celebration alongside Charlotte Jones Anderson, and signing on to be co-chair of the $25,000 Aikman/Staubach level of the Ruth Sharp Altshuler Tocqueville Society.

But in 2016, Aikman made his most significant contribution to United Way yet: He decided to dissolve the Troy Aikman Foundation for Children—which he had overseen since establishing it in 1992—and transfer its $1 million in assets to the Unite Forever Campaign. The Troy Aikman Foundation Fund was the first-ever donor-advised fund for United Way of Metropolitan Dallas, which enabled Aikman to make a groundbreaking investment in our community while retaining advisory privileges over the distribution and investment of the assets.

In the years since, Aikman’s bold decision has inspired other United Way supporters to establish donor-advised funds. “The world is changing rapidly. And so are we,” said Jennifer Sampson, McDermott-Templeton president and CEO of the United Way of Metropolitan Dallas. “Providing more, and more meaningful, opportunities for donor engagement for social impact is [our] mission. Donor-advised funds are a promising vehicle for us.”
Campaign Financials

41% CASH ($43,078,963)

38% LIFE INSURANCE ($31,850,000)

21% DEFERRED GIFTS ($22,843,000)

$105 million in cash and expectancies raised as of May 2022

$31,850 average gift amount

1,035 total donors

3,328 total gifts

163 gifts above $100,000

137 gifts above $250,000

53 endowed Tocqueville gifts (above $250,000)

$12,750,551 in United WayLife® life insurance expectancies

$21,520,589 distributed to United Way of Metropolitan Dallas since 2014

48 gifts above $1 million

$15 million raised through the Women of Tocqueville Fund for Women and Children

$7 million raised by the Ruth Sharp Altshuler Fund for Basic Needs

30 years

$7 million raised by the Ruth Sharp Altshuler Fund for Basic Needs

31 years

I began my civic career in Dallas as a community volunteer—following the example of my mother, an early United Way volunteer—and I am now delighted to help United Way accelerate its effectiveness as a vital agent for change in the metroplex.

- Lyda Hill, chairman of Lyda Hill Philanthropies and LH Capital

I first heard of United Way in 1958 or 1959, around when TI started their employee payroll deduction program. I signed up for it, because I really believe one needs to give back to the community. About three years ago, my wife was becoming ill, and I thought I should reassess my post-retirement plans. I did a lot of soul searching about what I should do and I developed a plan. In 2019 I revised my will and included a major legacy gift to United Way of Dallas. I Live United to support future generations, because that’s why I’m here: to help.

- Marv Lane, retired, Texas Instruments, longtime United Way supporter

Scan to view the full Unite Forever financials.
# 2021-2022 Investment Highlights

<table>
<thead>
<tr>
<th>FUND</th>
<th>Fiscal Year 2021-2022</th>
<th>Since 7/31/2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>UWFMD</td>
<td>-13.38</td>
<td>8.55</td>
</tr>
<tr>
<td>Blended Index</td>
<td>-10.77</td>
<td>8.49</td>
</tr>
</tbody>
</table>

## Activity Summary

<table>
<thead>
<tr>
<th>Fiscal Year 2021-2022</th>
<th>Since 7/31/2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning Market Value</td>
<td>56,679,078</td>
</tr>
<tr>
<td>Contributions</td>
<td>3,399,551</td>
</tr>
<tr>
<td>Distributions</td>
<td>(2,668,000)</td>
</tr>
<tr>
<td>Net Flows</td>
<td>731,551</td>
</tr>
<tr>
<td>Interest/Dividend Income</td>
<td>1,169,358</td>
</tr>
<tr>
<td>Gains/Losses</td>
<td>(8,836,034)</td>
</tr>
<tr>
<td>Total Earnings</td>
<td>(7,666,676)</td>
</tr>
<tr>
<td>Fees</td>
<td>(61,323)</td>
</tr>
<tr>
<td>Ending Market Value</td>
<td>$49,682,630</td>
</tr>
<tr>
<td>Time-weighted Return</td>
<td>-13.38</td>
</tr>
</tbody>
</table>

## Return Compared with Blended Index Fund

<table>
<thead>
<tr>
<th>Fiscal Year 2021-2022</th>
<th>Since 7/31/2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>UWFMD</td>
<td>8.55</td>
</tr>
<tr>
<td>Blended Index</td>
<td>8.49</td>
</tr>
</tbody>
</table>

## Portfolio Composition

<table>
<thead>
<tr>
<th>COMPOSITION</th>
<th>Market Value</th>
<th>% of Total</th>
<th>Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Fund</td>
<td>$49,682,630</td>
<td>100%</td>
<td>100%</td>
</tr>
<tr>
<td>Domestic Large Capitalization Equity Fund</td>
<td>19,439,440</td>
<td>39.13%</td>
<td>36.00%</td>
</tr>
<tr>
<td>International Large Capitalization Equity Fund</td>
<td>10,721,839</td>
<td>21.58%</td>
<td>22.00%</td>
</tr>
<tr>
<td>Domestic Small/Medium Capitalization Equity Fund</td>
<td>4,396,848</td>
<td>8.85%</td>
<td>9.00%</td>
</tr>
<tr>
<td>International Emerging Market Equity Fund</td>
<td>1,408,716</td>
<td>2.84%</td>
<td>3.00%</td>
</tr>
<tr>
<td>Short Term Bond Fund</td>
<td>13,090,787</td>
<td>26.35%</td>
<td>30.00%</td>
</tr>
<tr>
<td>Cash &amp; Equivalents</td>
<td>625,000</td>
<td>1.26%</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

## Time-Weighted Return

<table>
<thead>
<tr>
<th>Fiscal Year 2021-2022</th>
<th>Since 7/31/2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>2021-2022</td>
<td>-13.38</td>
</tr>
<tr>
<td>Since 7/31/2009</td>
<td>8.55</td>
</tr>
</tbody>
</table>

# 2021-2022 Portfolio Composition
Thanks to you, we soared past our ambitious $100 million Unite Forever Campaign goal and secured unprecedented support to endow our community impact work in perpetuity.

Your generous investments built our endowment—a full three years ahead of schedule—and will fuel our continued focus on outcomes in education, income and health. Your passionate commitment also established two important funds for building a stronger Dallas: one focused on creating opportunity for women and children and the other on basic needs and emergency services—a community safety net for the unexpected.

When these $100 million investments are fully secured, the endowment will spin off $4.5 million or more as it grows each year. Forever.

Absolutely essential to our success has been the galvanizing and forward-looking leadership of our United Way Board, led most recently by Charlene Lake and now by Stephen Williams, and our United Way Foundation Board, led by Terri West. We are also so grateful for our fabulous Unite Forever Co-Chairs Mary Templeton and Ed Galante and their team of highly committed vice-chairs, whose support energized us to do what many thought was impossible.

Yes, we have accomplished much together. And we applaud you, our community, for your outpouring of generosity, support and demonstrated belief in our strategic vision to Unite Forever.

On your shoulders, we now stand poised to look to the future. And as we march toward our second century of service and Centennial anniversary in 2025, we walk hand-in-hand with you to achieve our Aspire United 2030 community impact goals so all North Texans have opportunities to thrive.

These are historic moments for United Way Dallas and our Foundation. And you are an integral part of this rich history. Together we will build a better future for our children and their children to live, work and raise families in North Texas—this cherished community we call home.

Yes, your United Way stands strong. Yes, we aspire to do more. And together, we will.

Jennifer Sampson
McDermott-Templeton President & CEO

As United Way of Metropolitan Dallas enters our next century of service to the North Texas community, we invite you to join us and continue the Live United movement, forever. If you would like more information on remembering United Way in your estate, please contact Susan Hutcheson, Vice President, Leadership Giving, at shutcheson@unitedwaydallas.org.