

2019 ANNUAL REPORT



Charitable Service Trust

On Cover: *An airman hugs a child at McEntire Joint National Guard Base in Richland County, S.C., upon returning from a deployment to Southwest Asia. (Photo by Master Sgt. Caycee Watson/Air National Guard)*



Charitable Service Trust

3725 Alexandria Pike • Cold Spring, KY 41076
859-441-7300 • cst@dav.org • cst.dav.org

Dear Caring Friend,

Thank you, first and foremost, for being a part of the DAV Charitable Service Trust and supporting our efforts to ensure victories for veterans. Our mission to give back to the men and women who have bravely served and sacrificed for our nation would not be possible without you.

With your help, we are able to assist our nation's heroes in regaining the confidence and quality of life they have earned. The Trust supports a wide range of special initiatives designed to promote mental, physical and emotional well-being for veterans and their families.

Through these important programs, veterans are able to achieve their personal victories, great and small—whether it's overcoming homelessness, physical barriers, unemployment or the emotional injuries that often come with wartime service.

For 34 years, the Trust has supported efforts to fulfill the unmet needs of those who served by working with people and programs that share our commitment to ensuring no veteran is left behind.

As new generations return from war in need of our assistance, we stand poised and ready to help them make the most of life's opportunities.

As a veteran and amputee who lost my leg in service, I can't tell you how important families and communities are in helping veterans regain their sense of dignity, purpose and belonging after an injury. Your support of the Trust makes you a stakeholder in our work to renew lives.

Your gift plays an important role in keeping the sacred promise we made to those we call to serve in harm's way. And your support ensures the programs highlighted throughout this report are in place to facilitate victories for veterans.

Thank you,

RICHARD E. MARBES
President





PHOTO BY AIRMAN CALEB VANCE/AIR NATIONAL GUARD



THE MISSION OF THE DAV CHARITABLE SERVICE TRUST

By supporting the DAV Charitable Service Trust, you help to fulfill a focused and noble purpose: empowering veterans to lead high-quality lives with respect and dignity.

To carry out this responsibility, the DAV Charitable Service Trust supports physical and psychological rehabilitation programs, enhances research and mobility for veterans with amputations and spinal cord injuries, benefits aging veterans, aids and shelters homeless veterans, and addresses the needs of veterans returning from recent combat service.



Navy Petty Officer 2nd Class Erwin Hill high-fives spectators during the annual Honoring Our Heroes Veterans Day Parade in Chula Vista, Calif. (Photo by Petty Officer 3rd Class Gavin Shields/Navy)

VICTORIES FOR VETERANS

Our nation's heroes leave nothing to chance when it comes to defending the country. And we, as concerned citizens, owe them nothing less than the best when they are changed as a result of their service.

By supporting the DAV Charitable Service Trust, you help veterans connect with new possibilities and address the most challenging hurdles that stand between them and their maximum potential.

The programs that benefit from the Trust address the wide range of physical and psychological barriers that impact a veteran's quality of life. The Trust identifies and assists initiatives that do things such as enhance research and mobility for veterans who've lost limbs or suffered spinal cord injuries, help our aging veterans enjoy a sense of dignity and peace, provide shelter to homeless veterans and give them a path toward a fulfilled life, and give caregivers and families of veterans the tools and resources they need to lead sustainable and enriched lives.

The Trust looks proactively at those wounded of all generations, with a particular focus on recent-war veterans. The goal: to help succeeding generations confront the barriers of war's wounds so they can make the most of their lives following trauma in the military.

When America's Veterans Win, We All Win

The transition to civilian life is a major adjustment for those who served—especially for those who were changed as a result of their service. The support and stability service members become accustomed to vanishes the day they are discharged. When that day comes, the culture and structure they know are taken away, and the bonds of service—of counting on one's fellow service members—are made distant.

Veterans of all eras are resilient by nature, but even the hearts of warfighters can be challenged when the foundation they know is removed and cannot fully be replaced. This is especially true for recent veterans, many of whom have endured multiple combat deployments as our nation has waged war on two fronts.

The Trust looks for initiatives that ease this transition and reconnect veterans with opportunities to enhance their health and outlook on life—for them and their families.

Historically, funds have been awarded to support:

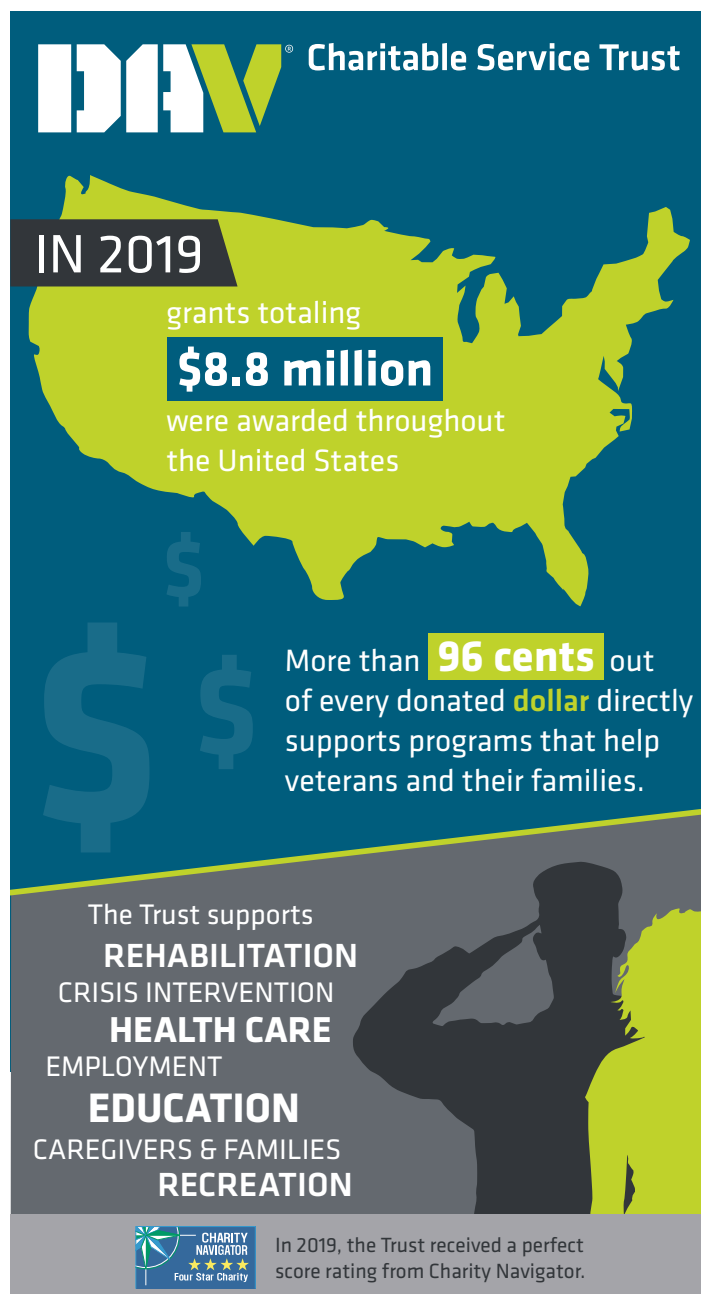
- Programs ensuring quality health care for veterans.
- Assistance to veterans suffering from post-traumatic stress disorder, traumatic brain injury, military sexual trauma, substance use disorders, and related or co-occurring conditions.
- Programs enhancing mobility for veterans with amputations, spinal cord injuries and other physical afflictions.
- Additional initiatives addressing the needs of veterans and caregivers or families from each era of conflict.

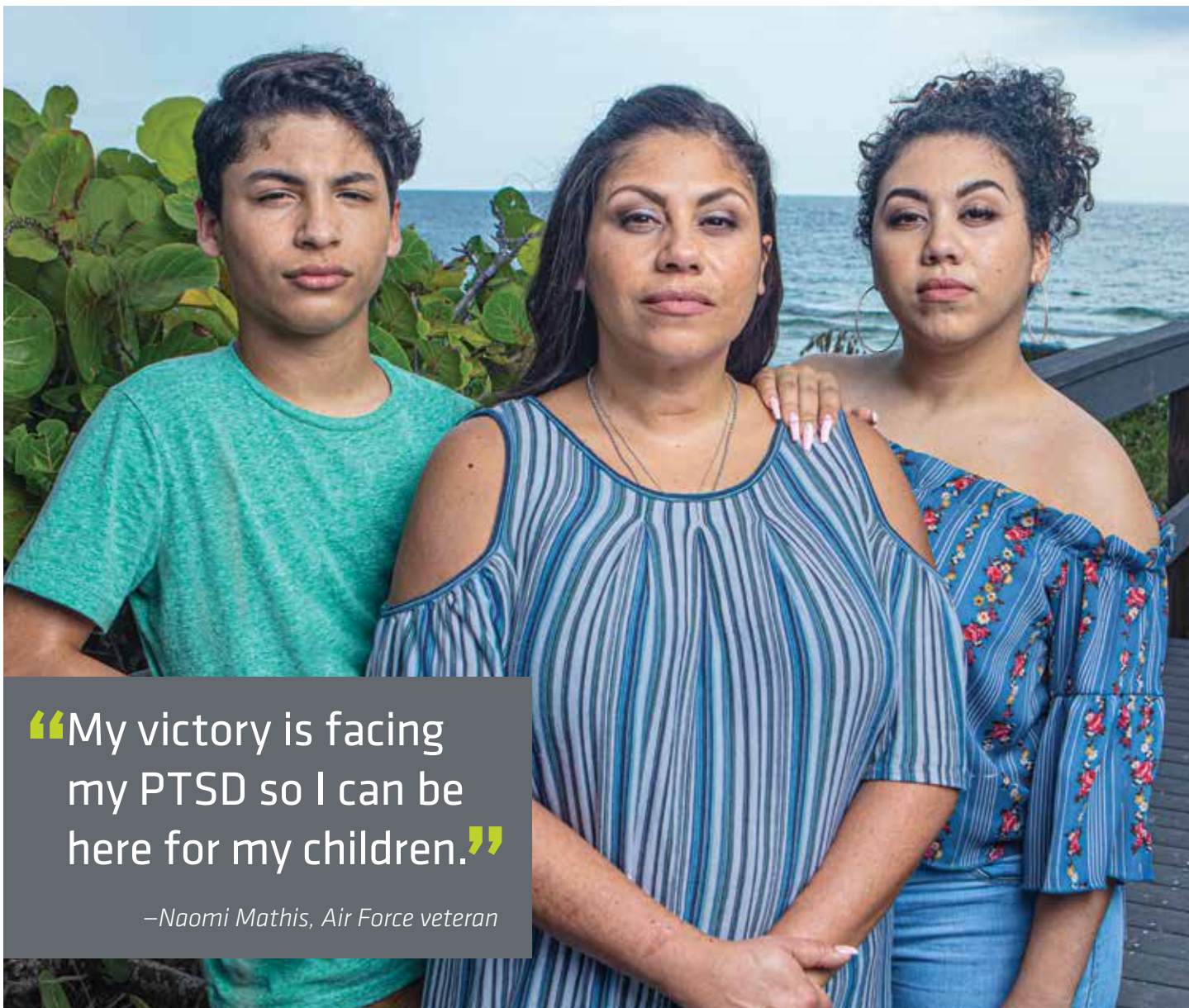
To date, funded programs and projects aid in providing a number of necessities to veteran clients and their families in each service region. Grants are typically distributed to offer:

- Food, shelter and other necessary items for homeless or at-risk veterans and their families.
- Mobility items or other assistance specific to veterans with blindness, vision loss, hearing loss or amputations.
- Qualified, evidence-based therapeutic or recreational activities for veterans and their families.
- Physical and psychological rehabilitation projects.
- Education, training and career readiness.
- Other forms of support, as appropriate, for short- or long-term relief for veterans, caregivers and their families.

The Trust carefully evaluates and addresses the most vital needs of wounded, ill and injured veterans and their families while empowering them to maximize their quality of life after service. Throughout these pages, we highlight the past year's grant recipients who demonstrate the impact the Trust makes in the lives of the community it serves. We are grateful to those dedicated patriots who serve and volunteer to enact these important programs.

More than 96 cents out of every donated dollar went directly to support programs that contribute to the victories the Trust makes possible. Notably, the Trust has received the coveted 4-star rating for "sound fiscal management and commitment to accountability and transparency" from Charity Navigator for the 15th time since first being evaluated in 2002—and received its first perfect score rating in 2019. As Charity Navigator is the nation's largest independent charity evaluator, this acknowledgment speaks volumes about the Trust's careful and efficient stewardship of donated funds.





“My victory is facing my PTSD so I can be here for my children.”

—Naomi Mathis, Air Force veteran

Supporting Team

Most of the victories veterans enjoy through the DAV Charitable Service Trust are made possible by generous individuals making personal donations or participating in workplace giving campaigns and matching gift programs. We have also enjoyed tremendous assistance from various companies who recognize and contribute to our cause. Specifically, the Trust extends appreciation to Ford Motor Co.; Walt Disney Co.; ESPN Inc.; Vetsdontforgetvets.com; Wild Flower Foundation Inc.; Milton and Fannie Brown Family Foundation; Gratis Foundation; William C. Collignon Family Foundation; L.P. Brown Foundation; DV FT Holding LLC; Prudential Financial; Alice F. & Cortland J. Knipe Charitable Trust; Chisholm, Chisholm & Kilpatrick LTD; Myer Family Charitable Foundation; Wells Fargo Foundation; and many other corporations and foundations that supported the Trust so graciously in 2019.



Mercy House Living Centers provides residential services to veterans in California.

The Victories

Enhanced Quality of Life

Veterans can sometimes face unforeseen consequences to the intangibles of life as a result of their service injuries. For some of our most profoundly injured veterans, a victory can be as simple as the restoration of life's most basic joys. Fortunately, the Trust has dedicated itself to helping other organizations that provide services to improve the quality of life for veterans.

- Funds from the Trust helped Mountain Resource Center Inc. in Colorado provide housing, utilities, mental health assistance, emergency support, health care coverage, transportation and coverage for costs associated with special events for veterans and their families.
- The Trust granted funds to Fort Bend Seniors Meals on Wheels and Much, Much More to serve daily nutritious meals to veterans and their spouses in Texas through their Meals on Wheels and Congregate Meals programs.
- In North Carolina, funds from the Trust assisted Wilmington Area Rebuilding Ministry Inc. with home restoration and repairs for wounded, ill and injured veterans.
- Funds from the Trust helped Mercy House Living Centers provide residential services to veterans and their family members living in California.
- The Trust granted funds to Cincinnati-based Joseph House Inc. to support the employment of a licensed clinician and weekend case manager for homeless or at-risk veterans receiving substance use disorder treatment in Indiana, Kentucky and Ohio.



Funds from the Trust helped Wilmington Area Rebuilding Ministry Inc. replace a dilapidated entry ramp into the house of 82-year-old veteran Jack Holt.



“My victory was getting off the streets and making things right with my family.”

—Mike Biggs, Army veteran

Housing & Employment

Housing and employment are major components for veterans as they work to return to normalcy after an unexpected injury. The Trust proudly supports numerous organizations dedicated to helping veterans secure housing and employment when necessary.

- The Trust awarded funds to the Minnesota Assistance Council for Veterans to deliver financial assistance to wounded, ill and injured veterans facing housing and employment difficulties.
- In New Hampshire, funds from the Trust helped Harbor Homes support its Homeless Veteran Reintegration Program in providing necessary items to eliminate the barriers homeless veterans face securing employment.
- Funds from the Trust helped Homeward Bound of Marin provide homeless veterans in Marin County, California, with shelter, housing, support services and other basic needs.



Disabled veterans can take part in the Vail Veterans Foundation Inc. Summer Family Program, which is supported by the Trust.

Adaptive Sports & Outdoors Therapy

Maintaining physical health and preserving an active outdoor lifestyle become more difficult when an injury drastically changes one's physical abilities. Overcoming new challenges and having the opportunity to reconnect with the champion within are critically important steps toward recovery.

- Funds from the Trust helped Vail Veterans Foundation Inc. host the Summer Family Program for severely injured veterans and their families from across the nation.
- The Trust granted funds to Maryland-based Project Healing Waters Fly Fishing Inc., which conducts therapeutic fly-fishing programs and outings for wounded, ill and injured veterans.

Animal-Assisted Therapy

Service dogs have long been heralded as great assets for ill and injured veterans, but now other animals are also demonstrating the capacity to assist in the recovery of those with both physical and psychological barriers.

- The Trust granted funds to North Carolina-based Canines for Service Inc. to help offer trained service dogs to wounded, ill and injured veterans nationwide through its Canines for Veterans program.
- In California, funds from the Trust helped Lockwood Animal Rescue Center support its Wolves and Warriors program in providing therapeutic and job training services to wounded, ill and injured veterans.



Project Healing Waters Fly Fishing Inc. conducts therapeutic fly-fishing programs and outings for disabled veterans in Maryland.



The chorus of “The Falling & the Rising” at Seattle Opera was composed of local veterans who have experienced homelessness and other trauma. In 2019, the opera presented five performances of the production, which was attended by over 1,100 individuals—84% of whom were veterans or family members of veterans. (Photo by Philip Newton)

Creative Healing

In the military, veterans are ingrained with a sense of selflessness. Their humility and focus on the team over the individual makes any form of self-glorification unthinkable. But after experiencing the trauma that comes with wartime service, the ability to express oneself and process deep and complicated emotions can be extremely therapeutic. These creative outlets provide a great vehicle for helping wounded veterans rediscover their sense of self-worth and learn more about themselves and others.

- The Trust granted funds to Kentucky Center for the Arts Foundation Inc. to support its Arts in Healing program, which assists veterans in Kentucky, Ohio and Indiana with reintegration and processing military experiences.
- In Washington, funds from the Trust supported Seattle Opera’s “The Falling & the Rising” program in delivering arts to wounded veterans to help them heal and recover.
- Funds from the Trust helped New York University offer veterans the opportunity to write about their military experiences through the Veterans Writing Workshop.



Legal Assistance

Veterans sometimes may be forced to fight in the justice system to obtain the benefits they've earned through service. The Trust proudly supports numerous organizations dedicated to providing legal assistance when necessary.

- The Trust awarded funds to The Veterans Consortium Pro Bono Program, based in Washington, D.C., to support its Discharge Upgrade Program in providing free legal representation to ill and injured veterans nationwide.
- In Ohio, funds from the Trust assisted the Veterans Legal Team at Community Aid Legal Services Inc. in delivering free legal assistance to wounded, ill and injured veterans.

A Triumph for the Bold

The Trust is proud of its legacy of service to empower veterans. The unique programs outlined in these pages illustrate the life-changing assistance provided to those who served, allowing veterans of all generations to find their victories.

Thanks to the loyal supporters who generously donate to the Trust each year, veterans are able to access the resources and services they need to lead high-quality lives with respect and dignity.



DAV National Adjutant Marc Burgess (center left) presents a \$1 million check to The Veterans Consortium. The grant will fully support the next four years of TVC's Discharge Upgrade Program, which provides legal assistance to veterans seeking to upgrade a less-than-honorable discharge.

SUMMARY OF ACTIVITIES

Support & Revenue

Support:

Contributions — Without Donor Restrictions	\$ 6,812,217
Contributions — With Donor Restrictions	1,190,453
Contributions of Charitable Gift Annuities	640,375
Bequests.	1,577,126
Total Support	\$ 10,220,171

Revenue:

Interest & Dividend Income — Net	723,272
Gain (Loss) on Sale of Investment Securities	209,440
Total Revenue	\$ 932,712
Total Support & Revenue	\$ 11,152,883

Expenses

Program Services	\$ 8,865,886	(96%)
Management & General.	198,882	(2%)
Fundraising	127,218	(2%)
Total Expenses.	\$ 9,191,986	
Excess of Support & Revenue Over Expenses.	\$ 1,960,897	

Percentage of Total Expenses



Change in Net Unrealized Appreciation of Investments	\$ 3,814,625
Charitable Gift Annuity Valuation Adjustment	(122,522)
Change in Net Assets	\$ 5,653,000
Net Assets — Beginning of Year	\$ 28,479,819
Net Assets — End of Year.	\$ 34,132,819

The complete financial statements have been audited and received an unqualified opinion. A copy of the audited statement is available upon request.



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Nonprofit Status

The DAV Charitable Service Trust is a tax-exempt organization and all contributions made to it are tax deductible.

The DAV Charitable Service Trust is a nonprofit organization incorporated in the District of Columbia. It is exempt from tax under Title 26 U.S.C. §501(c)(3). Contributions to the Trust are deductible pursuant to Title 26 U.S.C. §170(c).



In 2019, the DAV Charitable Service Trust received the coveted 4-star rating and a perfect overall score from Charity Navigator, marking the 15th time the Trust has received a 4-star rating for “sound fiscal management and commitment to accountability and transparency” since first being evaluated in 2002. As Charity Navigator is the nation’s largest independent charity evaluator, this acknowledgment speaks volumes about the Trust’s careful and efficient stewardship of donated funds. The Trust also received the 2019 Gold Seal of Transparency from GuideStar by Candid.



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