



LEHIGH VALLEY COMMUNITY FOUNDATION

ADVISOR CONNECTION

April 2026

Recognizing Advisors Who Make Philanthropy Possible

The Community Foundation (LVCF) is proud to introduce the **Professional Advisor Recognition Society (PARS)**, a new initiative designed to honor the vital role that professional advisors play in advancing philanthropy across our region. Attorneys, accountants, financial planners, and wealth managers are often the first to help individuals and families consider how charitable giving fits into their financial and legacy plans. Through their guidance, clients can align their values with their financial goals—creating meaningful, lasting impact in the Lehigh Valley.

Philanthropy in Practice

PARS was established to recognize these trusted professionals who have helped their clients establish charitable funds or complete planned gifts with LVCF. Their partnership reflects not only technical expertise, but also a deep commitment to strengthening our community for generations to come.

Membership in PARS includes advisors who have demonstrated this commitment in a variety of ways—whether by guiding a client in establishing a fund, working with multi-generational philanthropic families, or maintaining a fund of their own. These individuals understand that philanthropy is an integral part of thoughtful financial and estate planning.

Elevating Advisor Partnerships

Through PARS, LVCF aims to formally acknowledge and celebrate these contributions. Recognized advisors will be featured on the Foundation's website and in publications and will be included in LVCF events, offering opportunities to stay engaged and build connections. PARS members may also be considered for the Foundation's Service

to Philanthropy Award, recognizing those who demonstrate leadership in integrating charitable giving into their work.

As part of this initiative, **Maureen Wendling, CAP®**, Director of Donor Initiatives, will schedule visits with each PARS member to personally express appreciation. During these visits, each advisor will receive a recognition award to proudly display in their office as a symbol of their commitment to philanthropy and the community.

"Professional advisors are often the bridge between a client's financial vision and their philanthropic aspirations," Maureen explained. "Through PARS, we are proud to recognize the advisors who not only understand the technical aspects of giving, but who also inspire generosity and help their clients create lasting legacies in our community."



Maureen and Anthony P. Beltrami, Esq.

As LVCF continues to grow and serve the region, partnerships with professional advisors remain essential. Together, we can ensure that charitable giving is both strategic and deeply personal—benefiting donors, their families, and the entire Lehigh Valley.

For advisors interested in learning more about PARS or partnering with LVCF, we welcome the opportunity to connect and continue building a stronger, more vibrant community—together.



PARS members Dennis Morton & Kathryn Brown, Morton Brown Family Wealth

"Charitable giving is most powerful when it's intentional. We're grateful to partner with organizations like the Lehigh Valley Community Foundation to help clients turn their values into action in a way that feels personal and lasting."

Kathryn Brown, CFP®, ChFC®, CAP®, Co-Founder and Senior Wealth Advisor with Morton Brown Family Wealth

[Learn more](#) and see the members of the Professional Advisors Recognition Society and contact:



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Cornerstone Cares: Employee-Driven Philanthropy with Lasting Community Impact

At the Lehigh Valley Community Foundation (LVCF), we are proud to partner with organizations that are deeply committed to strengthening our community. **Cornerstone Advisors Asset Management, LLC's Cornerstone Cares program** is a compelling example of how corporate philanthropy, when driven by employee passion and local insight, can create meaningful, lasting impact.

Cornerstone Cares is an evergreen community impact initiative rooted in a simple but powerful belief: businesses have a responsibility to help shape the communities in which they live and work. Built on a longstanding culture of volunteerism and charitable engagement, the program reflects a desire among employee-owners to expand their leadership role in the community, both now and into the future.

"We believe it is our duty to be on the forefront in shaping the world we want to live in," said **Stephen Link** of Cornerstone. "Cornerstone Cares is the product of passionate employees who want to help guide our firm and our impact, today and moving forward."

A Collaborative Approach to Grantmaking

What sets Cornerstone Cares apart is its highly collaborative and inclusive approach to grantmaking. Through its donor-advised fund at LVCF, employees are invited to nominate charitable organizations that align with causes they care about and the needs they see firsthand. Funding decisions are then made through employee voting, ensuring that grants are values-driven, community-informed, and representative of collective engagement across the firm.

"Our grantmaking process is intentionally employee-owner driven," Link added. "By inviting our team to nominate and vote on organizations, we ensure our giving reflects the causes and community needs that resonate most to our co-owners."

Addressing Critical Needs: A Focus on Food Access

A key focus area for the program is food access—an issue that has also been front and center for LVCF through the Bridge Fund for Critical Needs. Cornerstone recognizes that access to nutritious food is foundational to both individual success and broader community well-being. When individuals must dedicate significant time and energy to securing basic nutrition, their



ability to learn, work, and thrive is diminished. By prioritizing food access, Cornerstone Cares is not only addressing an urgent need but also aligning with LVCF's broader efforts to respond to critical needs across our region and investing in long-term economic and social stability.

"Food access is closely linked with success in school and the workplace," said Link. "Supporting access to nutritious meals is not only a community commitment, it's an investment in long-term economic and social stability."

Why Partner with a Community Foundation

Cornerstone's decision to establish its fund with the Lehigh Valley Community Foundation reflects a shared commitment to local impact. With extensive roots in the Lehigh Valley, across Pennsylvania, and throughout the country, the firm recognized the value of partnering with a community foundation that offers deep, place-based knowledge and a long-term perspective. This partnership enhances their ability to respond to evolving community needs while strengthening the region's philanthropic infrastructure.

"Community foundations bring deep, localized knowledge of the needs and opportunities within the regions they serve," Link noted. "Partnering with LVCF allows us to better address those needs while strengthening the communities we call home."

A Model for Thoughtful Corporate Philanthropy

For other firms considering a similar path, Cornerstone offers a clear takeaway: thoughtful philanthropy requires more than efficiency—it requires insight. While cost considerations matter, community foundations provide the local expertise and strategic guidance necessary to build sustainable impact. Engaging directly with LVCF can help organizations align their charitable goals with real community needs, ensuring that their giving makes a meaningful difference over time.

Cornerstone Cares demonstrates the power of aligning employee engagement, strategic giving, and community partnership. For professional advisors and fundholders, it serves as a strong model of how donor-advised funds can be leveraged not only as a giving vehicle, but as a catalyst for deeper connection and impact.