

CAUSE CONNECTION

Connecting people who care to causes that matter

Trusting Community Leadership to Make a Difference

For Roger and Kathy Yott, giving is less about recognition and more about impact. Now retired, Roger and Kathy built careers in very different fields, Roger as an electrical engineer working in energy infrastructure and international power contracts, and Kathy as an analyst, middle school math teacher, and corporate trainer. While their professional lives didn't center on philanthropy, their personal experiences ultimately shaped a deep commitment to giving.

Giving Shaped by Personal Connection

Through years of volunteering with programs supporting low-income families, individuals experiencing homelessness, and refugees, they developed relationships that changed their perspective. "We've met many people whose lives are very different, and more difficult than ours," they shared. "In some cases, we've become friends. Their stories have influenced our giving." Today, their philanthropy focuses on children, families, and immigrants, priorities that align closely with the Community Foundation's work in early childhood education and workforce development.

A Different Approach to Philanthropy

Rather than establishing a named fund, Roger and Kathy have chosen a different path. They give directly to the Community Foundation through their IRAs, trusting the Foundation to steward their contributions where they are needed most. Introduced through their financial advisor, Marilee Falco, they saw this approach as both practical and purposeful.



For them, the decision comes down to confidence in community leadership. By supporting the Foundation's Youth and Families initiatives, they are investing in a broader vision, one shaped by those working closely with the community every day. Their story is a reminder that philanthropy can take many forms. Sometimes, it's about stepping back, placing trust in experienced partners, and allowing collective knowledge to guide meaningful change.

Outside of their giving, Roger and Kathy remain deeply engaged in the community. Roger shares his passion for science as a part-time educator at the DaVinci Science Center, while Kathy is actively involved through her church in supporting local refugee families, an experience that reflects her deep commitment to building relationships and helping others feel at home. She has also embraced learning Spanish in retirement, becoming conversational through persistence and connection with others. Together, they continue to seek out opportunities to learn from different cultures, both through travel and right here in the Lehigh Valley.

In a diverse and evolving community, their approach reflects a simple but powerful idea: when you trust the people doing the work, your giving can go further.



Collective Grantmaking Snapshot

For February & March 2026

This bi-monthly snapshot reflects the collective impact of donor-advised and other charitable funds at LVCF, supporting trusted organizations.

- \$1.01 million awarded through 146 grants to 114 nonprofit organizations
- 11.4% of total grant dollars provided as general operating/flexible support

Top Issue Areas by Dollars Granted

- Human Services: \$335,000
- Arts, Culture, and Creative Economy: \$221,000
- Community and Economic Development: \$161,000

Top Issue Areas by Number of Grants

- Human Services: 42 grants
- Community & Economic Development: 30 grants
- Arts, Culture, and Creative Economy: 26 grants

Nearly 82% of grant dollars stayed local in the Lehigh Valley

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.