

# COLLIS O. TOWNSEND

*Principal, Collis Townsend & Associates, LLC*

## PROFILES

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Collis Townsend & Associates, LLC (CT&A) mission is to make the world a better place to live and raise children. We achieve this through stimulating the charitable impulse and helping people, organizations and communities to maximize their resources. We have expertise in Foundation Management, Board Governance, Executive Leadership, Strategic Planning, Investments, Grant Evaluation and more.

Collis O. Townsend has twenty-five years experience in wealth management and philanthropy. A dedicated and smart worker, he has successfully led large national projects and statewide initiatives. He has hands-on knowledge of the public, private and non-profit sectors.

## PROFESSIONAL EXPERIENCE

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| <b><i>COLLIS TOWNSEND &amp; ASSOCIATES, LLC</i></b>        | <b><i>2002 -</i></b> |
| <i>Principal</i>   |                      |
| <u>Community Foundations Investment Partnership (CFIP)</u> | (2003 - )            |
| <i>National Agent</i>                                      |                      |
| <u>Community Foundations Services Corporation (CFSC)</u>   | (2003 - )            |
| <i>National Agent</i>                                      |                      |

National representative for innovative network of community foundations working in collaboration with the Merrill Lynch Center for Philanthropy & Nonprofit Management. Current assets in Merrill Lynch Community Charitable Fund® Program: \$180 million, grants distributed \$100 million.

### Select Accomplishments:

- Provided professional staff support to the CFSC Board of Directors and CFIP Management Committee. Worked closely with outside counsel, auditors, investment advisors and technology provider. Received overall 7.6 (out of 9) average member satisfactory rating for 2007.
- Expanded network of community foundations. Created enrollment package and supporting CD. Provided basic and advance training via webex. Membership increased from Founding 13 members to 65 community foundations.
- Identified Financial Advisor market segments and produced “Road Maps” and Marketing Binders to send targeted Newsletters and blast e-mails. Maintain program related website ([www.NPIAgent.com](http://www.NPIAgent.com)). 3,800 Financial Advisors (23% of sales force) registered.
- Documented policies and procedures. Created comprehensive MLCCF Program Operating Manual and disseminated 18 related Policy Bulletins. Maintained program-related Help Desk. Received 7.7 (out of 9) average member satisfactory rating for Help Desk in 2007.

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MicroEdge, Inc (2006 - )  
*DAF Solutions Consultant*

MicroEdge is the leading provider of software and services to the giving community worldwide. Maximizing opportunities in the donor-advised fund marketplace by overseeing client relationships, contract negotiations, data conversions and product implementations. In 2007, MicroEdge closed two enterprise level clients. Currently working on business plan for expanding DAF services.

Brown Brothers Harriman (2005 - )  
*DAF Program Consultant*

Rockefeller Philanthropy Advisors (2005 - )  
*DAF Program Consultant*

Merrill Lynch Center for Philanthropy & Nonprofit Management (2002)  
*Creative Consultant*

Principal architect of the Merrill Lynch Community Charitable Fund<sup>®</sup> Program, Merrill Lynch's community foundation-based response to The Fidelity Gift Fund. Served as lead consultant in the design and implementation of this innovative donor-advised fund offering.

***DELAWARE COMMUNITY FOUNDATION, Wilmington, DE*** 1987 – 2001  
*Executive Director*

Directly responsible for launching of new philanthropic holding company (community foundation). National leader in marketing innovations. Total assets: \$130 million.

Selected accomplishments:

- Provided executive leadership to a dynamic, growth oriented organization. On average, assets doubled every three years for fourteen years. Managed \$1.3 million administrative budget and staff of ten. Received DANA Outstanding Excellence Award (1999) and NSFRE – Outstanding Foundation Leadership Award (1992).
- Proven experience in annual and planned giving. Actively worked with donors, their attorneys and estate planning professionals. Major gifts include; the Rodel Charitable Foundation – a \$45 million supporting organization, the Delaware Arts Stabilization Fund – a \$21 million consortium, State of Delaware – a \$2 million challenge grant and the Fund for Women – currently \$2 million and growing.
- Oversaw all marketing and public relations efforts; including public speaking, website, brochures, newsletters and annual reports. Built statewide reputation for integrity. Received public recognition for print materials; including Delaware Today insert, *Building Our Foundation* (1994), and in IABC Award, *Our First Years* (1991).

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- Provided agile stewardship to investment program. Monitored asset allocation process and rebalanced portfolios regularly. Working with outside consultants, evaluated manager performance on a quarterly basis. From 1994 to 2000 earned average rate of return of 17%, surpassing market indexes by 50 basis points.
- Organized annual grantmaking programs. Total grants awarded - \$25 million. Major areas of program interest included: Technology Access Project (2000 – 2001), Violence Prevention in Children (1994 – 1999), Housing Capacity Building Program, (1992 – 1998). Ongoing work with libraries and disadvantaged populations.
- Recognized leader in local non-profit community. Served on numerous Boards and received DANA Lifetime Achievement Award (2001).

***THE FOURTH FLOOR, Wilmington, DE***  
*Business Manager*

***1986 – 1987***

Created Multi-Family Office for a branch of the du Pont family. Worked closely with estate planners, investment professionals and family service vendors.

***THOMSON McKINNON SECURITIES, INC., Memphis, TN***  
*Vice President and Office Manager*

***1981 – 1985***

Full management responsibility of 25 broker office with over \$3 million in annual sales. Prior positions as manager of smaller office and regional coordinator.

***BAKER, WATTS & COMPANY, Baltimore, MD***  
*Stockbroker*

***1980 - 1981***

***STOCKARD SHIPPING & TERMINAL CORP., Baltimore, MD***  
*Steamship Agent – (SGS, SAF Marine, Port of Baltimore)*

***1979 – 1980***

**EDUCATION**

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Washington College, Chestertown, MD. B. A. Economics  
Noble & Greenough School, Dedham, MA.  
Renbrook School, West Hartford, CT

*References available upon request*

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