

Tennessee Secretary of State  
Tre Hargett



Division of Business and Charitable Organizations  
312 Rosa L. Parks Avenue, 6th Floor  
Nashville, Tennessee 37243-1102

November 06, 2023

JANA R LAIOLO  
3421 BELMONT BLVD  
NASHVILLE, TN 37215 USA

**RE:** Registration to Solicit Funds for Charitable Purposes  
Organization Name: COMMUNITY FOUNDATION OF MIDDLE TENNESSEE, INC.  
CO Number: CO1769  
Renewal Date: 06/30/2024

Dear JANA R LAIOLO :

Pursuant to the Tennessee Charitable Solicitations Act, T.C.A. § 48-101-501, *et seq.* the Tennessee Secretary of State has reviewed your application and is pleased to announce your organization's registration to solicit contributions has been **approved**.

The organization must maintain statutory compliance by submitting a renewal application and required fees on an annual basis. At that time you may be required to submit tax filings, financial statements, proof of IRS status, and other documents related to your organization and its fundraising activities. You can find additional information and submit additional filings online at <https://sos.tn.gov/charities>. The "CO" Number listed above will serve as your organization's charitable registration number and should be used when submitting any charitable filings or correspondence.

Please also be advised that if the organization's application or other provided information includes false, misleading or deceptive statements, appropriate action will be taken. Pursuant to the Tennessee Charitable Solicitations Act, a civil penalty of up to five thousand dollars (\$5,000.00) may be assessed for any violation.

Thank you for registering your organization and please do not hesitate to contact us with any questions.

Sincerely,

Tre Hargett  
Secretary of State

Tracking Number  
2023131614

## Application to Renew Registration of a Charitable Organization

Division of Business and Charitable Organizations

Department of State

State of Tennessee

312 Rosa L. Parks Avenue, 6th Floor

Nashville, Tennessee 37243

Phone: 615-741-2555

Fax: 615-253-5173

sos.tn.gov/charities



Tre Hargett  
Secretary of State

CO Number: CO1769  
Filed: 11/02/2023 10:33 AM  
Tre Hargett  
Secretary of State

### Organization Information

**Legal Name of the Charitable Organization:** COMMUNITY FOUNDATION OF MIDDLE TENNESSEE, INC.

**Legal entity type of the Organization:** Corporation

**Business Services Control Number:** 000242991

**FEIN:** 62-1471789

**CO Number:** CO1769

**Initial Registration Date:** 11/13/1991

**Renewal Date:** 11/27/2023

**Has your fiscal year ending month changed since your last renewal?**

☐ Yes ☒ No

**Fiscal Year Ending Month:** December

**When and where was the organization legally established**

**Date:** 07/01/1991

**Country:** USA

**City/State:** NASHVILLE, TN

**Has your Principal Office address changed since your last renewal?**

☒ Yes ☐ No

**Amended Principal Office Address**

3421 BELMONT BLVD  
NASHVILLE, TN 37215, USA

**Has your Mailing address changed since your last renewal?**

☒ Yes ☐ No

**Amended Mailing Office Address**

3421 BELMONT BLVD  
NASHVILLE, TN 37215, USA

**Contact Information for the Charitable Organization**

**Contact Name:** JANA R LAIOLO

**Telephone Number:** (615) 321-4939

**Fax Number:** (615) 327-2746

**Email:** finance@cfmt.org

**Website:** www.cfmt.org

**Current names used by the charity organization**

**Do you need to modify other names that the charity solicits under?**

☐ Yes ☒ No

**Has the organization registered in any other state(s)?**

☒ Yes ☐ No

**Other States**

AL, AK, AR, CA, CO, CT, FL, GA, HI, IL, KS, KY, ME, MD, MA, MI, MN, MS, NH, NJ, NY, NC, OH, OK, PA, OR, RI, SC, UT, VA, WA, WV, WI

**Does the charity have other offices, chapters, branches, affiliates or a parent?**

☐ Yes ☒ No

**The category that best describes your organization**

T - Philanthropy, Voluntarism and Grantmaking Foundations

**The charitable purpose of the organization**

The Community Foundation of Middle Tennessee provides philanthropic services focused on combining the charitable gifts of many to provide leadership and financial leverage in addressing the current and future needs of the community through various grant making activities designed to improve the lives of the citizens in Middle Tennessee.

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**Tax & Financial Information**

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**Has your tax exempt status changed since your last renewal?**

☐ Yes ☒ No

**Last Fiscal Year Start:** January 2022

**Last Fiscal Year End:** December 2022

**Type of 990 Tax Form Filed:** 990 (Long Form)

**Gross Revenue**

Direct and Indirect Public Contributions	\$ 49,170,100.00
Government Grants	\$ 8,862,058.00
Program Service Revenue	\$ 0.00
Special Events and Activities	\$ 1,832,420.00
Gross Sales of Inventory	\$ 0.00
Other Revenue	\$ 8,592,578.00
<b>Total Revenue</b>	<b>\$ 68,457,156.00</b>

**Expenses**

Total Program Expenses	\$ 65,866,865.00
Direct Expenses from Special Events	\$ 1,133,586.00
Cost of Goods Sold	\$ 0.00
Management and General Expenses	\$ 2,044,165.00
Fundraising Expenses	\$ 2,725,562.00
Other Expenses	\$ 0.00
<b>Total Expenses</b>	<b>\$ 71,770,178.00</b>

<b>Excess/Deficit For the Year</b> <b>(Total Revenue - Total Expenses)</b>	<b>(\$ 3,313,022.00)</b>
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**Changes in Net Assets/Fund Balances**

Net Assets/Fund Balances at Beginning of Year	\$ 605,661,283.00
Other Changes in Net Assets or Fund Balances	(\$ 62,595,915.00)
Net Assets/Fund Balances	\$ 539,752,346.00
Total Liabilities at End of Year	\$ 23,333,616.00
Net Assets/Fund Balances at End of Year	\$ 539,752,346.00

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## Solicitation Information

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Have you been enjoined by any court from soliciting contributions?

☐ Yes ☒ No

Does your organization contract with or otherwise engage the services of any outside fundraising professional (such as a "professional fund-raiser," "paid solicitor," "fund raising counsel," or "commercial co-venturer")?

☐ Yes ☒ No

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## Officer Information

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Do you need to modify the current officers?

☒ Yes ☐ No

List each officer, director, and trustee (at least 2 officers are required, and you must list officers who have or share the following titles: "Chief Financial Officer", "Custodian of Contributions", "Custodian of Final Distributions")

CATHERINE JACKSON  
5819 Hillsboro Rd  
Nashville, TN 37215, USA  
Title(s): Trustee

KEVIN LAVENDER  
424 Church Street #700  
Nashville, TN 37219, USA  
Title(s): Trustee

Ms. DONNA NICELY  
304 St. James Park  
Nashville, TN 37215, USA  
Title(s): Trustee

ELLEN E LEHMAN  
3421 BELMONT BLVD  
NASHVILLE, TN 37215-1605, USA  
Title(s): Trustee

Alan Young  
468 Craighead St, Ste 200  
Nashville, TN 37204, USA  
Title(s): Board Member

ALBERTO R Gonzales  
225 Ennismore Lane  
Brentwood, TN 37027, USA  
Title(s): Trustee

Andy May  
4525 Harding Pike #300  
Nashville, TN 37205, USA  
Title(s): Treasurer

Aubrey B. Harwell, Jr.  
1231 Carl Seyfert Memorial Drive  
Brentwood, TN 37027, USA  
Title(s): Board Member

Bernard Freeland  
1056 Vaughn Crest Drive  
Franklin, TN 37069, USA  
Title(s): Trustee

Beth DeBauche  
209 Kensington Park  
Nashville, TN 37215, USA  
Title(s): Board Member

Betsy Walkup  
3710 Richland Ave.  
Nashville, TN 37205, USA  
Title(s): Trustee

Bob Corker  
1649 Minnehaha Road  
Chattanooga, TN 37405, USA  
Title(s): Trustee

Carl Haley  
5 St. James Place  
Nashville, TN 37215, USA  
Title(s): Trustee

Carol Hudler  
135 Wentworth Avenue  
Nashville, TN 37215, USA  
Title(s): Trustee

Cary Mack  
161 Rosa L. Parks Blvd.  
Nashville, TN 37027, USA  
Title(s): Board Member

Charles Cook, Jr.  
3608 Richland Ave  
Nashville, TN 37205, USA  
Title(s): Trustee

Charles A Trost  
317 Harpeth Ridge Drive  
Nashville, TN 37221, USA  
Title(s): Trustee

Christine KARBOWIAK YANEK  
200 4th Ave. So  
Nashville, TN 37201, USA  
Title(s): Vice Chairman

Deborah Tate  
3433 Hampton Avenue  
Nashville, TN 37215, USA  
Title(s): Trustee

Deborah F. Turner  
9574 Hampton Reserve Drive  
Brentwood, TN 37027, USA  
Title(s): Trustee

Decosta E. Jenkins  
1156 Cleveland Hall Blvd.  
Old Hickory, TN 37138, USA  
Title(s): Trustee

Farzin Ferdowsi  
1728 General George Patton Drive, Suite 200  
Brentwood, TN 37027, USA  
Title(s): Trustee

Gail Williams  
700 Millstone Lane  
Nashville, TN 37205, USA  
Title(s): Board Member

Herbert Fritch

700 12th Ave So., #1401  
Nashville, TN 37203, USA  
Title(s): Board Member

Honorable William Koch, Jr.  
321 Supreme Court Building, 401 7th Avenue No  
Nashville, TN 37219, USA  
Title(s): Trustee

Jack O. Bovender, Jr.  
520 Belle Meade Blvd.  
Nashville, TN 37205, USA  
Title(s): Trustee

Jamie Cheek  
2300 Charlotte Ave., #103  
Nashville, TN 37203, USA  
Title(s): Board Member

Jana Davis  
3810 Bedford Ave. #200  
Nashville, TN 37215, USA  
Title(s): Trustee

Jay Williams  
4415 Tyne Blvd  
Nashville, TN 37215, USA  
Title(s): Board Member

Jerry Williams  
1207 18th Avenue South, #202  
Nashville, TN 37212, USA  
Title(s): Trustee

Jim Gingrich  
150 4th Ave. N, 21st Floor  
Nashville, TN 37219, USA  
Title(s): Board Member

Kerry Graham  
154 5th Ave. N.  
Nashville, TN 37219, USA  
Title(s): Trustee

Laurence Papel  
4320 Signal Hill Dr.  
Nashville, TN 37205, USA  
Title(s): Board Member

Lyle Beasley  
302 Hillwood Blvd.  
Nashville, TN 37205, USA  
Title(s): Chairman

Mark Emkes  
13 Colonel Winstead Dr  
Brentwood, TN 37027, USA  
Title(s): Trustee

Max Goldberg  
423 Ellendale Rd  
Nashville, TN 37205, USA  
Title(s): Board Member

Melisa Currey  
3833 Cleghorn Avenue, Suite 400  
Nashville, TN 37215, USA  
Title(s): Custodian of Contributions, Other, Chief Fiscal Officer

Paul Stumb  
515 West Spring St.  
Lebanon, TN 37087, USA  
Title(s): Board Member

Ray Guzman  
4004 Haversack Dr  
Spring Hill, TN 37174, USA  
Title(s): Board Member

Richard Eskind  
104 Lynnwood Blvd  
Nashville, TN 37205, USA  
Title(s): Trustee

Robert Lipman  
1311 Moran Road  
Franklin, TN 37069, USA  
Title(s): Trustee

Ronald L Corbin  
14 Torrey Pines Way  
Brentwood, TN 37027, USA  
Title(s): Trustee

Sara Finley  
509 Close Lane  
Nashville, TN 37205, USA  
Title(s): Secretary

Shari Dennis  
1102 Draughton Ave  
Nashville, TN 37204, USA  
Title(s): Board Member

Stephen Flatt  
1872 Sanctuary Place  
Murfreesboro, TN 37128, USA  
Title(s): Trustee

Steve Underwood  
480 Great Circle Road  
Nashville, TN 37228, USA  
Title(s): Trustee

HAL G CATO  
3421 BELMONT BLVD  
NASHVILLE, TN 37215, USA  
Title(s): Chief Executive Officer, Custodian of Final Distributions

Thomas F. Frist, Jr.  
1304 Chickering Road  
Nashville, TN 37215, USA  
Title(s): Trustee

Turner Nashe, Jr.  
7 Vellano Court  
Brentwood, TN 37027, USA  
Title(s): Board Member

Waverly Crenshaw  
1 Vantage Way, Suite E200  
Nashville, TN 37228, USA  
Title(s): Board Member

Wayne Smith  
504 Westview Ave.  
Nashville, TN 37205, USA

Title(s): Board Member

Will Alexander  
1104 Halcyon Ave  
Nashville, TN 37204, USA  
Title(s): Board Member

Will Morrow  
4417 Sheppard Place  
Nashville, TN 37205, USA  
Title(s): Board Member

AMY FAIR  
3833 CLEGHORN AVENUE  
NASHVILLE, TN 37215  
Title(s): Vice President

JULIE FRIST  
810 JACKSON BLVD.  
NASHVILLE, TN 37205, USA  
Title(s): Board Member

MILTON JOHNSON  
ONE PARK PLAZA  
NASHVILLE, TN 37203, USA  
Title(s): Board Member

HAL G CATO  
3421 BELMONT BLVD  
NASHVILLE, TN 37215, USA  
Title(s): Chief Executive Officer

DEE PATEL  
3421 BELMONT BLVD  
NASHVILLE, TN 37215, USA  
Title(s): Board Member

COURTNEY ROSS  
3421 BELMONT BLVD  
NASHVILLE, TN 37215, USA  
Title(s): Board Member

JACK TURNER  
3421 BELMONT BLVD  
NASHVILLE, TN 37215, USA  
Title(s): Trustee

**Has any officer, director, manager, operator, or principal of the organization been the subject of an injunction, judgement, or administrative order or been convicted of a felony?**

☐ Yes ☒ No



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## Signature

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I certify that the statements in this registration statement and all supplemental forms, documents, and continuation sheets are true and correct to the best of my knowledge and belief.

I (Chief Fiscal Officer, Treasurer, or Officer) certify, under penalty of perjury, that the above information is true and correct.

**Signed Electronically:** Melisa Currey

**Date:** 10/31/2023

**Title:** Chief Fiscal Officer

I certify that the statements in this registration statement and all supplemental forms, documents, and continuation sheets are true and correct to the best of my knowledge and belief.

I (Chief Fiscal Officer, Treasurer, or Officer) certify, under penalty of perjury, that the above information is true and correct.

**Signed Electronically:** Hal Cato

**Date:** 11/02/2023

**Title:** Chief Executive Officer



Tre Hargett  
Secretary of State

**Division of Business and Charitable Organizations**

**Department of State**

State of Tennessee  
312 Rosa L. Parks Avenue, 6th Floor  
Nashville, Tennessee 37243  
Phone: 615-741-2555  
Fax: 615-253-5173  
sos.tn.gov/charities

**Date:** 11/02/2023

**Invoice:** 2023-08789

**Customer Information**

JANA R LAIOLO  
COMMUNITY FOUNDATION OF MIDDLE TENNESSEE, INC.  
3421 BELMONT BLVD  
NASHVILLE, TN 37215 , USA

Tracking Number	Description	Amount Paid
2023131614	CH Charitable Renewal	\$ 10.00
<b>Payment Details</b>		
Fee Total:		\$ 10.00
Payment Total:		\$ 10.00
Amount Due:		\$ 0.00
Refunded Amount:		\$ 0.00
<b>Payment Method</b>		
Payment Type: Credit Card		
Check/Confirmation Number: 3861207384		