



The TEXAS SOUTHMOST COLLEGE FOUNDATION INC., Board of Directors will meet in person at Texas Southmost College, International Technology Education and Commerce Center (ITECC) Art Gallery (H100), located at 301 Mexico Boulevard, Brownsville, Texas 78520, and virtually via Zoom, commencing at 12:30 PM on Wednesday, December 18, 2024, to consider and act on the following items:

1. Call to Order
2. Establish Quorum
3. Consideration and possible action on the approval of the minutes of the Board of Directors meeting of October 16, 2024
4. Executive Committee
 - a. Chair Report
 - b. Consideration and possible action on appointment/reappointment of TSC Foundation Board member(s)
 - c. Consideration and possible action on election of TSC Foundation Officers for 2025
 - d. Review Proposed 2025 TSC Foundation Meeting and Event Dates
5. Finance Committee
 - a. Investment Report through October 31, 2024
 - b. Investment Policy Review
6. Gala Committee
 - a. Amethyst Gala Update
7. Mariachi Festival Committee
 - a. Mariachi Festival Committee Report
8. Alumni Committee
 - a. Update
9. CEO/Staff Reports
10. Announcement of Next Meetings/Events
 - a. Executive Committee Meeting -- January 29, 2025, at 12:00 pm
 - b. Donor Meet and Greet Event -- January 30, 2025, at 6:00 pm

c. Board of Directors Meeting -- February 19, 2025

11. Adjournment

Chair Report

4a

**Consideration and possible
action on
appointment/reappointment
of TSC Foundation Board
member(s)**

4b

TSC Foundation Board of Directors
Terms, Officers, and Committees

Board Member	Officer/Category	Term	Executive <div></div>	Bylaws <div></div>	Strategic Fundraising (Ad hoc) <div></div>	Gala <div></div>	Finance <div></div>	Scholarship <div></div>	Mariachi Festival <div></div>	Alumni <div></div>
Roy De los Santos	Chair	2026								
Adela Garza	Vice Chair (TSC Board Chair)	N/A								
Norma Hinojosa	Secretary	2024								
Dr. Gustavo Stern	Treasurer	2025								
Dr. Jesus Roberto Rodriguez	Foundation CEO (TSC President)	N/A								
Edward Bustos	Member	2026								
Joey Camacho	Member	2026								
Dr. Nellie Cantu	Member	2026								
Maru De La Paz	Member	2026								
Edgar E. Garcia	Member (TSC Board Designee)	N/A								
Dr. Norma Lopez Harris	Member (TSC Board Secretary)	N/A								
Roel Rodriguez	Member	2026								
Delia Saenz	Member (TSC Board Vice Chair)	N/A								
Jose Salazar	Member	2024								
Nick Shah	Member	2025								

- Dr. Gisela Figueroa, Vice President of Finance and Administration: Staff member on Finance Committee
- Mr. Richard Mesquias, Vice President of External Relations and Workforce Development: Staff member for Ad hoc Strategic Fundraising Committee

Consideration and possible action on election of TSC Foundation Officers for 2025

4c

TSC Foundation

2024 Officers

Chair Roy De los Santos

Vice Chair Adela G. Garza

Secretary Norma Hinojosa

Treasurer Dr. Gustavo Stern

Review Proposed 2025 TSC Foundation Meeting and Event Dates

4d

2025 CALENDAR

TSC Foundation Meetings and Events

JANUARY S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	FEBRUARY S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28	MARCH S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	APRIL S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30
MAY S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	JUNE S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	JULY S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	AUGUST S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31
SEPTEMBER S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	OCTOBER S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	NOVEMBER S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	DECEMBER S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Meetings and Events:

Jan 29 - Executive Committee Meeting
Jan 30 - Donor Meet and Greet
Feb 19 - Board of Directors Meeting
Mar 26 - Executive Committee
Apr 12 - Amethyst Gala
Apr 23 - Board of Directors Meeting
Ap 25-26 - Mariachi Festival

May 28 - Executive Committee
Jun 25 - Board of Directors Meeting
Jul 23 - Executive Committee
Aug 27 - Board of Directors Meeting
Sep 24 - Executive Committee
Oct 22 - Board of Directors Meeting
Nov 19 - Executive Committee

Dec 17 - Annual Board Meeting
-
-

2025-2026 Scholarship Contribution determined no later than April Board meeting
Alumni Events/Activity in 2025 for 100th anniversary in 2026

Investment Report through October 31, 2024

5a

Market Value as of close 12/16/24
\$12,808,603.40

Texas Southmost College Foundation

MONTHLY CLIENT REPORT

As of October 31, 2024

Agenda

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Team Overview

Investment advisory team

Chris Koeller

Vice President, Client Portfolio Manager

OCIO Solutions

24 Years of industry experience

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(336) 324-8746

Steve Guggenberger, CIMA

Managing Director – Client Portfolio Management

OCIO Solutions

35 Years of industry experience

Guggenberger.Steve@Principal.com

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Economic and Market Review

As of September 30, 2024

Q4 2024 key themes

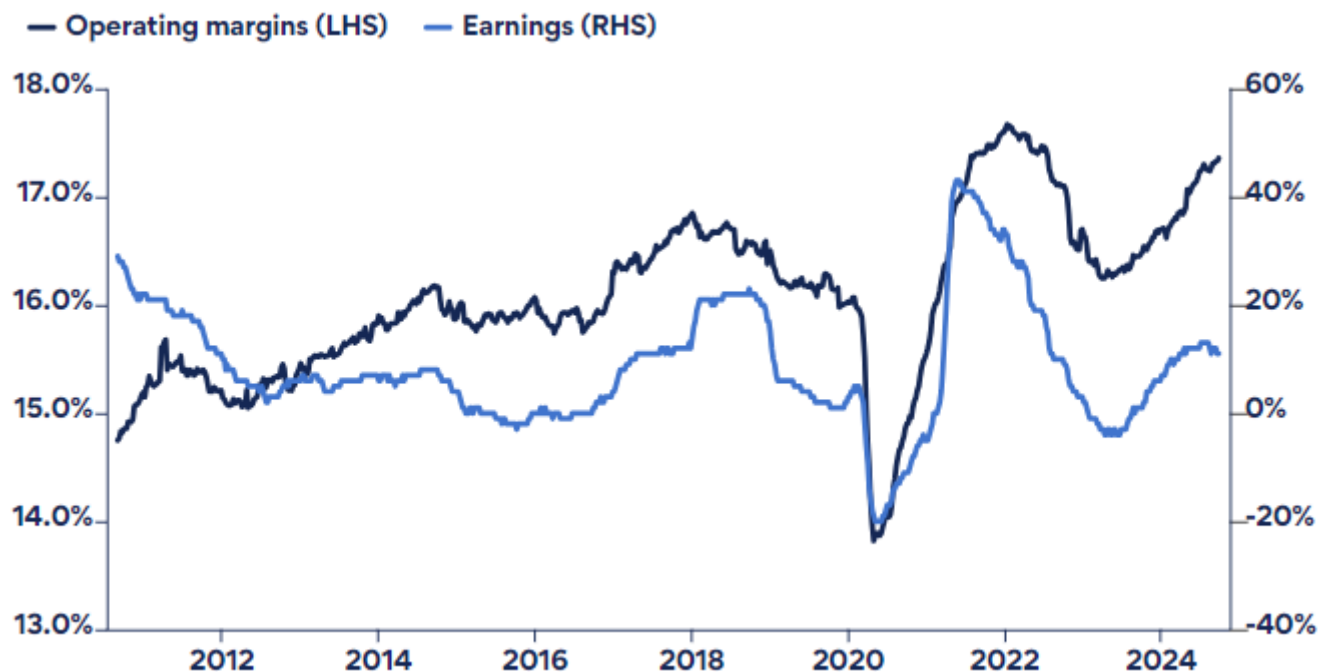
- **A globally synchronized downturn produces a globally synchronized policy easing.**
As global growth has weakened, policymakers have started to respond. The U.S. Federal Reserve is committed to avoiding recession, while China's recent policy measures also raise the odds of a global soft landing.
- **The U.S. economy: Slowdown does not imply recession.**
Labor market cooling has triggered recession concerns, but the continued strength of consumer and corporate balance sheets implies that job layoffs, and therefore recession, can be avoided. A moderation to trend growth appears likely.
- **Central banks are determined to secure soft landings.**
The Fed is set to lower rates toward 3% and may frontload rate cuts if there are further signs of labor market weakness. The Fed's commitment to a soft landing will likely be mirrored by other central banks keen to avoid overly strong currencies.
- **Equity markets confront valuation challenges, but Fed cuts should support continued gains.**
Historically, a Fed cutting cycle without recession has resulted in a strong equity market performance. While stretched valuations suggest gains may be more limited this time, a broadening of gains beyond just tech presents possible opportunities.
- **Fixed income typically shines in a late cycle slowdown.**
Fixed income spreads are tight, but elevated yields have continued to draw investor interest. Combined with strong growth, Fed cuts should reduce default risk, likely extending the credit cycle.
- **With potential gains across asset classes, staying in cash is the leading risk.**
With the Fed's rate cutting cycle appearing to be now underway, the attractiveness of cash may now be rapidly diminishing. As global stimulus lifts prospects for risk assets across the globe, investors should generally be optimizing this constructive environment.

Earnings season: Starting from a place of resilience

INSIGHT:

The third quarter earnings season has begun, and while expectations have tempered since earlier in the year, the corporate sector remains strong, with ample buffers given elevated profit margins and strong balance sheets. With the help of Fed cuts, they are well-positioned to navigate the period ahead even as the economy weakens.

S&P 500 next 12 months operating margin and Y/Y earnings growth estimates
September 2010 – present



Economic and Market Review

As of September 30, 2024

Domestic equity markets were all positive for the quarter, led by small and mid-cap stocks.

Fixed income markets rallied during the quarter as rates fell in anticipation of the Fed's decision to lower interest rates.

	3-months	YTD	1-year	3-year	5-year	10-year
U.S. Equities						
Russell 1000 Value Index	9.43%	16.68%	27.76%	9.03%	10.69%	9.23%
S&P 500 Index	5.89%	22.08%	36.35%	11.91%	15.98%	13.38%
Russell 1000 Growth Index	3.19%	24.55%	42.19%	12.02%	19.74%	16.52%
Russell Midcap Index	9.21%	14.63%	29.33%	5.75%	11.30%	10.19%
Russell 2000 Index	9.27%	11.17%	26.76%	1.84%	9.39%	8.78%
Non-U.S. Equities						
MSCI EAFE NTR Index	7.26%	12.99%	24.77%	5.48%	8.20%	5.71%
MSCI ACWI ex-USA Index	8.06%	14.21%	25.35%	4.14%	7.59%	5.22%
MSCI Emerging Markets Index	8.72%	16.86%	26.05%	0.40%	5.75%	4.02%
Fixed Income						
ICE BofA U.S. Treasury Bill 3-month Index	1.37%	4.03%	5.46%	3.49%	2.32%	1.65%
Bloomberg Aggregate Bond Index	5.20%	4.45%	11.57%	-1.39%	0.33%	1.84%
Bloomberg U.S. Corp High Yld 2% Issuer Capped Index	5.28%	8.00%	15.73%	3.09%	4.70%	5.04%
Bloomberg Long-Term Govt/Credit Index	7.96%	3.54%	17.24%	-6.17%	-1.97%	2.32%
Other						
MSCI U.S. REIT Index	15.79%	14.82%	32.74%	3.73%	4.24%	6.46%
S&P GSCI® Index	-5.26%	5.23%	-6.06%	8.81%	8.03%	-2.35%
U.S. Dollar Index	-4.81%	-0.55%	-5.13%	2.26%	0.28%	1.61%

As of September 30, 2024.

Source: Morningstar Direct. Returns are annualized. **Past performance does not guarantee future results.** Index performance information reflects no deduction for fees, expenses, or taxes. Indices are unmanaged and individuals cannot invest directly in an index. See Important Information for index descriptions.

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Asset Class Returns

As of September 30, 2024

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	YTD
Best ↑	Small Cap 38.82%	Real Estate 31.78%	Real Estate 4.23%	Small Cap 21.31%	Emerging Markets 37.28%	Cash 1.86%	Large Cap 31.49%	Small Cap 19.96%	Real Estate 46.18%	Commodities 16.09%	Large Cap 26.29%	Large Cap 22.08%
	Mid Cap 33.50%	Government Treasury 25.07%	Large Cap 1.38%	Mid Cap 20.74%	Intl Stocks 25.03%	Intermediate Bond 0.01%	Mid Cap 26.20%	Large Cap 18.40%	Large Cap 28.71%	Cash 1.50%	Intl Stocks 18.24%	Emerging Markets 16.86%
	Large Cap 32.39%	Large Cap 13.69%	Asset Allocation 1.28%	High Yield 17.34%	Large Cap 21.83%	Government Treasury -1.84%	Real Estate 25.76%	Emerging Markets 18.31%	Commodities 27.11%	High Yield -11.11%	Asset Allocation 17.67%	Real Estate 14.88%
	Intl Stocks 22.78%	Asset Allocation 10.62%	Intermediate Bond 0.55%	Large Cap 11.96%	Mid Cap 16.24%	Intl Bonds -2.15%	Small Cap 25.53%	Government Treasury 17.70%	Mid Cap 24.76%	Intermediate Bond -13.01%	Small Cap 16.93%	Asset Allocation 14.80%
	Asset Allocation 17.56%	Mid Cap 9.77%	Cash 0.03%	Commodities 11.77%	Small Cap 14.65%	High Yield -2.26%	Asset Allocation 22.18%	Asset Allocation 14.73%	Asset Allocation 15.86%	Mid Cap -13.06%	Mid Cap 16.44%	Mid Cap 13.54%
	High Yield 7.38%	Intermediate Bond 5.97%	Intl Stocks -0.81%	Emerging Markets 11.19%	Asset Allocation 14.21%	Asset Allocation -2.35%	Intl Stocks 22.01%	Mid Cap 13.66%	Small Cap 14.82%	Intl Stocks -14.45%	Real Estate 16.10%	Intl Stocks 12.99%
	Real Estate 1.86%	Small Cap 4.89%	Government Treasury -1.21%	Asset Allocation 8.31%	Intl Bonds 10.51%	Large Cap -4.38%	Emerging Markets 18.44%	Intl Bonds 10.11%	Intl Stocks 11.26%	Asset Allocation -15.79%	High Yield 13.40%	Small Cap 11.17%
	Cash 0.06%	High Yield 2.44%	Mid Cap -2.18%	Real Estate 7.24%	Government Treasury 8.53%	Real Estate -4.84%	Government Treasury 14.83%	Intl Stocks 7.82%	High Yield 5.29%	Large Cap -18.11%	Emerging Markets 9.83%	High Yield 7.90%
	Intermediate Bond -2.02%	Cash 0.02%	Small Cap -4.41%	Intermediate Bond 2.65%	High Yield 7.48%	Small Cap -11.01%	High Yield 14.40%	Intermediate Bond 7.51%	Cash 0.05%	Intl Bonds -18.70%	Intermediate Bond 5.53%	Commodities 5.86%
	Emerging Markets -2.60%	Emerging Markets -2.19%	High Yield -4.55%	Intl Bonds 1.49%	Real Estate 4.18%	Mid Cap -11.08%	Intermediate Bond 8.72%	High Yield 6.20%	Intermediate Bond -1.54%	Emerging Markets -20.09%	Cash 5.26%	Intermediate Bond 4.45%
	Intl Bonds -3.08%	Intl Bonds -3.08%	Intl Bonds -6.02%	Government Treasury 1.33%	Intermediate Bond 3.54%	Commodities -11.25%	Commodities 7.69%	Cash 0.58%	Emerging Markets -2.54%	Small Cap -20.44%	Intl Bonds 3.99%	Cash 4.17%
	Commodities -9.52%	Intl Stocks -4.90%	Emerging Markets -14.92%	Intl Stocks 1.00%	Commodities 1.70%	Intl Stocks -13.79%	Intl Bonds 5.09%	Commodities -3.12%	Government Treasury -4.65%	Real Estate -26.81%	Government Treasury 3.06%	Government Treasury 2.42%
Worst ↓	Government Treasury -12.66%	Commodities -17.01%	Commodities -24.66%	Cash 0.27%	Cash 0.84%	Emerging Markets -14.58%	Cash 2.25%	Real Estate -7.90%	Intl Bonds -7.05%	Government Treasury -29.26%	Commodities -7.91%	Intl Bonds 1.00%

The returns reflect performance of certain indexes as defined below. This information is general in nature and is not intended to be reflective of any specific plan. Cash-FTSE 3-month T-bill, Government Treasury-BBg Long Treasury, Commodities-Bloomberg Commodity Idx, Intermediate Bond-BBg US Agg Bond Idx, High Yield Bond-ICE BofA High Yield Idx, Intl Bonds-Bloomberg Global Aggregate ex USD, Asset Allocation-portfolio assumes the following weights: 60% S&P 500 and 40% BBg US Agg, Large Cap-S&P 500, Mid Cap-S&P Midcap 400, Small Cap-Russell 2000, Intl Stocks-MSCI EAFE (net), Emerging Markets-MSCI EM (net), Real Estate-Wilshire U.S. REIT. **Past performance does not guarantee future results.**

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Cash flow

AS OF OCTOBER 31, 2024

	One month	Three month	Year to-date	Fiscal year to-date	One year	Three year	Five year	Ten year
Beginning market value	12,802,781	12,393,564	11,404,590	12,615,370	10,156,232	12,401,106	9,893,440	7,914,851
Withdrawals	-	-	-	-	-557,299	-	-	-
Gains/loss	-270,221	138,995	1,127,969	-82,810	2,376,327	699,308	3,881,801	6,636,527
Ending market value	12,532,560	12,532,560	12,532,560	12,532,560	12,532,560	12,532,560	12,532,560	12,532,560

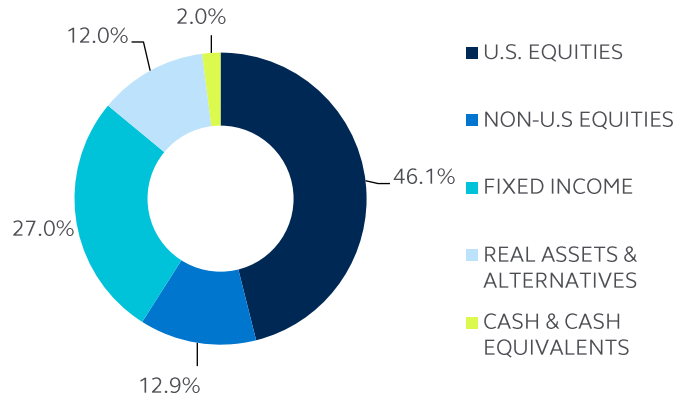
Portfolio inception: November 30, 2002

Returns for periods of less than one year are not annualized. **Past performance is not a reliable indicator of future performance and should not be relied upon to make investment decisions.** It is not possible to invest directly in an index. See Important Information for further details.

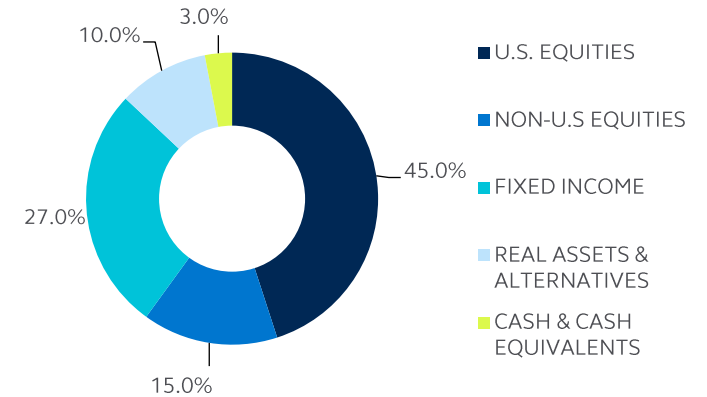
Investment policy summary

AS OF OCTOBER 31, 2024

Actual
allocation



Target
allocation



For asset allocation purposes and aggregate portfolio performance reporting, asset class category assignments for individual investment options are determined by OCIO Solutions and may differ from the assigned Morningstar category for a given investment.

Investment policy summary

AS OF OCTOBER 31, 2024

Asset class	Actual allocation		Minimum allocation	Target allocation	Maximum allocation	Variance
U.S. EQUITY	5,775,171.02	46.08%	30.00%	45.00%	60.00%	1.08%
LARGE VALUE	1,197,672.75	9.56%	5.50%	9.50%	13.50%	0.06%
LARGE BLEND	1,784,272.27	14.24%	8.00%	12.50%	17.00%	1.74%
LARGE GROWTH	1,199,377.39	9.57%	5.50%	9.50%	13.50%	0.07%
U.S. MID CAP EQUITY	1,063,124.41	8.48%	5.00%	8.50%	12.00%	-0.02%
U.S. SMALL CAP EQUITY	530,724.20	4.23%	2.50%	5.00%	7.50%	-0.77%
NON-U.S. EQUITY	1,620,626.96	12.93%	4.00%	15.00%	44.00%	-2.07%
DEVELOPED MARKETS	1,372,115.25	10.95%	4.00%	12.50%	44.00%	-1.55%
NON-U.S. EMERGING MARKETS EQUITY	248,511.71	1.98%	0.00%	2.50%	20.00%	-0.52%
FIXED INCOME	3,382,618.64	26.99%	10.00%	27.00%	50.00%	-0.01%
INTERMEDIATE BOND	3,382,618.64	26.99%	10.00%	27.00%	50.00%	-0.01%
BANK LOAN	-	-	0.00%	0.00%	10.00%	0.00%
HIGH YIELD BONDS	-	-	0.00%	0.00%	10.00%	0.00%
EMERGING MARKETS FIXED INCOME	-	-	0.00%	0.00%	10.00%	0.00%
REAL ASSETS & ALTERNATIVES	1,502,216.24	11.99%	0.00%	10.00%	20.00%	1.99%
INFRASTRUCTURE	498,008.17	3.97%	0.00%	3.00%	10.00%	0.97%
REAL ESTATE	749,970.98	5.98%	0.00%	4.00%	15.00%	1.98%
COMMODITIES	254,237.09	2.03%	0.00%	3.00%	10.00%	-0.97%
CASH & CASH EQUIVALENTS	251,927.17	2.01%	0.00%	3.00%	20.00%	-0.99%
MONEY MARKET	251,927.17	2.01%	0.00%	3.00%	20.00%	-0.99%
Total market value:		\$12,532,560.03	Policy as amended on:			06/06/2022

For asset allocation purposes and aggregate portfolio performance reporting, asset class category assignments for individual investment options are determined by OCIO Solutions and may differ from the assigned Morningstar category for a given investment.

Asset allocation overview

AS OF OCTOBER 31, 2024

Fund	Market value	Actual allocation
U.S. EQUITY	5,775,171.02	46.08%
LARGE VALUE		
DODGE & COX STOCK I	252,382.55	2.01%
MFS VALUE R6	468,260.98	3.74%
T. ROWE PRICE EQUITY INCOME	477,029.22	3.81%
LARGE BLEND		
VANGUARD 500 INDEX ADMIRAL	1,784,272.27	14.24%
LARGE GROWTH		
AB LARGE CAP GROWTH ADVISOR	596,416.87	4.76%
T. ROWE PRICE LRG CP GR I	602,960.52	4.81%
MID-CAP BLEND		
NORTHERN MID CAP INDEX	1,063,124.41	8.48%
SMALL VALUE		
GOLDMAN SACHS SMALL CAP VALUE INST	125,272.61	1.00%
SMALL BLEND		
JPMORGAN SMALL CAP EQUITY I	280,995.43	2.24%
SMALL GROWTH		
INVESCO SMALL CAP GROWTH R5	124,456.16	0.99%
NON-U.S. EQUITY	1,620,626.96	12.93%
FOREIGN LARGE VALUE		
CAUSEWAY INTERNATIONAL VALUE INSTL	373,737.92	2.98%
FOREIGN LARGE BLEND		
FIDELITY INTERNATIONAL INDEX	622,746.19	4.97%
FOREIGN LARGE GROWTH		
AMERICAN FUNDS EUROPACIFIC GROWTH F3	375,631.14	3.00%

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Asset allocation overview

AS OF OCTOBER 31, 2024

Fund	Market value	Actual allocation
DIVERSIFIED EMERGING MKTS		
ACADIAN EMERGING MARKETS I	124,396.25	0.99%
INVESCO DEVELOPING MARKETS R6	124,115.46	0.99%
FIXED INCOME	3,382,618.64	26.99%
INTERMEDIATE CORE BOND		
ALLSPRING CORE BOND INST	841,703.52	6.72%
INTERMEDIATE CORE-PLUS BOND		
DODGE & COX INCOME I	848,594.28	6.77%
FEDERATED HERMES TOTAL RETURN BOND IS	842,970.96	6.73%
TCW METWEST TOTAL RETURN BD I	849,349.88	6.78%
REAL ASSETS	1,502,216.24	11.99%
INFRASTRUCTURE		
LAZARD GLOBAL LISTED INFRASTRUCTURE INST	498,008.17	3.97%
REAL ESTATE		
COHEN & STEERS INSTL REALTY SHARES	749,970.98	5.98%
COMMODITIES BROAD BASKET		
ALPS/CORCMDTY MGMT CMPLTCMDTY STRAT I	254,237.09	2.03%
MONEY MARKET	251,927.17	2.01%
MONEY MARKET		
FEDERATED HERMES GOVT OBL PREMIER	251,927.17	2.01%
Total market value:		\$12,532,560.03

For asset allocation purposes and aggregate portfolio performance reporting, asset class category assignments for individual investment options are determined by OCIO Solutions and may differ from the assigned Morningstar category for a given investment.

Portfolio performance

AS OF OCTOBER 31, 2024

Time weighted returns	Three month	Year to-date	Fiscal year to-date	One year	Three year	Five year	Ten year	Since inception	Inception date
Total portfolio performance (Net)	1.11%	9.85%	9.85%	23.34%	2.21%	7.08%	6.47%	7.05%	11/30/2002
Texas Southmost College Fdn. Inc. Floating Benchmark	1.68%	10.75%	10.75%	24.90%	3.05%	7.32%	6.88%	7.30%	
Excess return	-0.57%	-0.90%	-0.90%	-1.56%	-0.84%	-0.24%	-0.42%	-0.25%	
Asset class return information									
EQUITY	1.50%	14.76%	14.76%	31.66%	5.09%	11.47%	9.82%	8.90%	11/30/2002
S&P 500 Index	3.66%	20.97%	20.97%	38.02%	9.08%	15.25%	12.99%	10.71%	
LARGE VALUE	1.77%	14.41%	14.41%	28.94%	7.20%	10.98%	9.52%	9.46%	02/28/2003
Russell 1000® Value Index	2.96%	15.40%	15.40%	30.98%	6.84%	10.13%	8.86%	9.63%	
LARGE BLEND	3.65%	20.93%	20.93%	37.96%	9.05%	15.23%	12.96%	14.43%	10/31/2012
S&P 500 Index	3.66%	20.97%	20.97%	38.02%	9.08%	15.25%	12.99%	14.46%	
LARGE GROWTH	3.82%	22.41%	22.41%	39.87%	4.24%	14.84%	13.82%	11.38%	02/28/2003
Russell 1000® Growth Index	4.63%	24.14%	2.85%	43.77%	8.84%	18.98%	16.17%	12.97%	
MID-CAP BLEND	0.31%	12.68%	12.68%	32.85%	4.97%	11.16%	9.66%	11.61%	10/31/2012
S&P MidCap 400 Index	0.36%	12.74%	2.53%	32.99%	5.19%	11.36%	9.85%	11.80%	
SMALL VALUE	-3.04%	6.58%	6.58%	27.31%	0.15%	7.16%	6.65%	9.57%	02/28/2003
Russell 2000® Value Index	-3.35%	7.51%	-1.56%	31.77%	1.94%	8.42%	7.32%	9.63%	
SMALL BLEND	0.03%	9.23%	9.23%	30.85%	1.23%	8.32%	8.90%	11.86%	08/31/2009
Russell 2000® Index	-2.24%	9.56%	9.56%	34.07%	-0.05%	8.49%	7.93%	10.76%	
SMALL GROWTH	1.27%	13.73%	13.73%	36.23%	-8.02%	8.57%	8.45%	10.56%	02/28/2003
Russell 2000® Growth Index	-1.12%	11.72%	6.97%	36.49%	-2.29%	7.91%	8.14%	10.43%	
FOREIGN LARGE VALUE	-1.32%	6.85%	6.85%	21.69%	8.11%	10.18%	5.97%	5.96%	08/31/2010
MSCI EAFE Value NTR Index	-0.87%	8.44%	-4.70%	22.75%	6.64%	6.47%	4.27%	5.58%	
FOREIGN LARGE BLEND	-1.52%	6.96%	6.96%	22.41%	2.56%	6.00%	4.55%	-	02/28/2003
MSCI EAFE NTR Index	-1.46%	6.85%	6.85%	22.97%	2.70%	6.24%	5.27%	7.39%	
FOREIGN LARGE GROWTH	-0.03%	8.41%	8.41%	23.54%	-1.90%	5.93%	-	-	08/31/2003
MSCI EAFE Growth NTR Index	-2.05%	5.33%	-0.85%	23.28%	-1.29%	5.62%	6.02%	6.87%	
DIVERSIFIED EMERGING MKTS	0.92%	9.24%	9.24%	21.05%	-0.91%	4.14%	3.45%	2.99%	03/31/2013
MSCI Emerging Markets NTR Index	3.58%	11.66%	3.89%	25.32%	-1.43%	3.93%	3.43%	3.18%	
FIXED INCOME	0.27%	2.35%	2.35%	11.58%	-1.81%	0.56%	2.01%	3.69%	11/30/2002
Bloomberg U.S. Aggregate Bond Index	0.25%	1.86%	1.86%	10.55%	-2.20%	-0.23%	1.49%	3.26%	
INTERMEDIATE CORE BOND	0.27%	2.20%	2.20%	11.08%	-2.11%	0.11%	1.73%	3.55%	02/28/2003
Bloomberg U.S. Aggregate Bond Index	0.25%	1.86%	1.86%	10.55%	-2.20%	-0.23%	1.49%	3.13%	

For asset allocation purposes and aggregate portfolio performance reporting, asset class category assignments for individual investment options are determined by OCIO Solutions and may differ from the assigned Morningstar category for a given investment. Returns for periods of less than one year are not annualized. **Past performance is not a reliable indicator of future performance and should not be relied upon to make investment decisions.** It is not possible to invest directly in an index. See Important Information for further details.

Portfolio performance

AS OF OCTOBER 31, 2024

Asset class return information	Three month	Year to-date	Fiscal year to-date	One year	Three year	Five year	Ten year	Since inception	Inception date
INTERMEDIATE CORE-PLUS BOND	0.27%	2.41%	2.41%	11.75%	-1.71%	0.70%	2.08%	3.81%	02/28/2003
Bloomberg US Universal TR USD	0.53%	2.52%	2.52%	11.20%	-1.78%	0.18%	1.82%	3.49%	
REAL ASSETS & ALTERNATIVES	2.29%	8.25%	8.25%	19.50%	-	-	-	3.74%	06/27/2022
90 Day U.S. Treasury Bill Plus 3%	2.09%	7.21%	7.21%	8.74%	-	-	-	8.03%	
INFRASTRUCTURE	0.11%	6.54%	6.54%	16.88%	-	-	-	6.84%	06/28/2022
FTSE Developed Core Infrastructure Index	4.57%	13.95%	13.95%	27.38%	-	-	-	5.72%	
REAL ESTATE	5.58%	12.96%	12.96%	36.01%	-	-	-	6.42%	06/28/2022
S&P 500 Real Estate	4.87%	7.68%	7.68%	30.52%	-	-	-	1.55%	
COMMODITIES BROAD BASKET	0.40%	2.34%	2.34%	0.67%	-	-	-	-3.98%	06/28/2022
Bloomberg Commodity Index	2.97%	3.89%	3.89%	-1.18%	-	-	-	-4.34%	
CASH & CASH EQUIVALENTS	1.29%	4.41%	4.41%	5.33%	3.64%	2.29%	1.62%	1.62%	11/30/2002
90 Day U.S. Treasury Bill	1.34%	4.62%	4.62%	5.59%	3.78%	2.44%	1.71%	1.56%	
MONEY MARKET	1.27%	4.40%	4.40%	5.32%	3.65%	2.30%	1.62%	1.63%	02/28/2003
90 Day U.S. Treasury Bill	1.34%	4.62%	1.81%	5.59%	3.78%	2.44%	1.71%	1.56%	

Portfolio inception: November 30, 2002

For asset allocation purposes and aggregate portfolio performance reporting, asset class category assignments for individual investment options are determined by OCIO Solutions and may differ from the assigned Morningstar category for a given investment. Returns for periods of less than one year are not annualized. **Past performance is not a reliable indicator of future performance and should not be relied upon to make investment decisions.** It is not possible to invest directly in an index. See Important Information for further details.

Investment performance

AS OF OCTOBER 31, 2024

	Average annual total returns							Inception date	Percentile rankings				Expense ratio (net/gross)	Expense limit expiration date
	Three month	Year to-date	One year	Three year	Five year	Ten year	Since inception		One year	Three year	Five year	Ten year		
Large Value														
T. ROWE PRICE EQUITY INCOME	1.57%	13.92%	29.07%	7.46%	10.34%	8.83%	10.57%	10/31/1985	60	54	58	57	0.68/0.68	–
Russell 1000® Value Index	2.96%	15.40%	30.98%	6.85%	10.14%	8.87%	–							
DODGE & COX STOCK I	2.38%	15.98%	31.97%	8.60%	13.93%	11.25%	11.25%	01/04/1965	32	31	7	8	0.51/0.51	–
Russell 1000® Value Index	2.96%	15.40%	30.98%	6.85%	10.14%	8.87%	–							
MFS VALUE R6	1.65%	14.05%	27.27%	6.16%	10.05%	9.46%	8.58%	05/01/2006	73	77	66	37	0.44/0.45	12/2024
Russell 1000® Value Index	2.96%	15.40%	30.98%	6.85%	10.14%	8.87%	–							
Large Value	2.49%	14.80%	29.70%	7.47%	10.72%	9.01%	Total funds in category		1168	1084	1022	796		
Large Blend														
VANGUARD 500 INDEX ADMIRAL	3.65%	20.93%	37.96%	9.04%	15.23%	12.96%	8.20%	11/13/2000	28	23	21	8	0.04/0.04	–
S&P 500 Index	3.66%	20.97%	38.02%	9.08%	15.27%	13.00%	–							
Large Blend	2.94%	18.07%	34.50%	7.49%	13.63%	11.47%	Total funds in category		1409	1288	1186	892		
Large Growth														
AB LARGE CAP GROWTH ADVISOR	3.61%	20.21%	37.65%	6.42%	16.35%	15.49%	10.57%	10/01/1996	72	42	41	14	0.6/0.6	–
Russell 1000® Growth Index	4.63%	24.14%	43.77%	8.84%	19.00%	16.18%	–							
T. ROWE PRICE LRG CP GR I	4.02%	24.63%	42.09%	5.87%	16.87%	15.66%	11.93%	10/31/2001	49	51	32	13	0.56/0.56	–
Russell 1000® Growth Index	4.63%	24.14%	43.77%	8.84%	19.00%	16.18%	–							
Large Growth	4.23%	21.35%	41.44%	4.80%	15.49%	13.38%	Total funds in category		1139	1073	1006	790		
Mid-Cap Blend														
NORTHERN MID CAP INDEX	0.31%	12.68%	32.85%	5.07%	11.24%	9.70%	9.61%	03/22/2005	46	41	32	29	0.1/0.16	07/2025
S&P MidCap 400 Index	0.36%	12.74%	32.99%	5.19%	11.37%	9.86%	–							
Mid Cap Blend	1.72%	13.17%	32.68%	4.50%	10.69%	9.00%	Total funds in category		431	403	365	253		

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Investment performance

AS OF OCTOBER 31, 2024

	Average annual total returns							Inception date	Percentile rankings				Expense ratio (net/gross)	Expense limit expiration date
	Three month	Year to-date	One year	Three year	Five year	Ten year	Since inception		One year	Three year	Five year	Ten year		
Small Blend														
GOLDMAN SACHS SMALL CAP VALUE INST	-3.04%	6.58%	27.31%	1.09%	6.72%	6.43%	8.79%	08/15/1997	81	70	93	88	1.0/1.03	12/2024
Russell 2000® Value Index	-3.35%	7.51%	31.77%	1.95%	8.42%	7.33%	–							
JPMORGAN SMALL CAP EQUITY I	0.03%	9.23%	30.85%	1.25%	8.34%	8.91%	10.39%	05/07/1996	51	68	74	19	0.99/1.0	10/2024
Russell 2000® Index	-2.24%	9.56%	34.07%	-0.05%	8.50%	7.94%	–							
Small Blend	-2.08%	9.03%	30.66%	2.37%	9.41%	7.89%	Total funds in category		592	569	545	386		
Small Growth														
INVESCO SMALL CAP GROWTH R5	1.27%	13.73%	36.23%	-8.02%	8.58%	8.47%	8.70%	03/15/2002	35	83	56	63	0.82/0.82	–
Russell 2000® Growth Index	-1.12%	11.72%	36.49%	-2.30%	7.92%	8.15%	–							
Small Growth	-0.06%	11.19%	34.09%	-3.55%	9.37%	9.23%	Total funds in category		564	542	521	399		
Foreign Large Value														
CAUSEWAY INTERNATIONAL VALUE INSTL	-1.32%	6.85%	21.69%	8.13%	9.30%	5.56%	7.34%	10/26/2001	50	6	4	12	0.88/0.9	01/2025
MSCI EAFE NTR Index	-1.46%	6.85%	22.97%	2.70%	6.24%	5.27%	–							
Foreign Large Value	-0.76%	7.21%	21.21%	4.73%	6.35%	4.34%	Total funds in category		354	328	302	208		
Foreign Large Blend														
FIDELITY INTERNATIONAL INDEX	-1.52%	6.96%	22.41%	2.81%	6.43%	5.35%	6.72%	09/08/2011	52	23	37	33	0.035/0.035	–
MSCI EAFE NTR Index	-1.46%	6.85%	22.97%	2.70%	6.24%	5.27%	–							
Foreign Large Blend	-0.72%	7.66%	22.46%	1.64%	6.00%	4.98%	Total funds in category		718	667	632	421		
Foreign Large Growth														
AMERICAN FUNDS EUROPACIFIC GROWTH F3	-0.03%	8.41%	23.54%	-1.94%	5.92%	5.70%	7.01%	01/27/2017	59	51	52	54	0.47/0.47	–
MSCI ACWI Ex-U.S. NTR Index	0.44%	8.61%	24.33%	1.60%	5.78%	4.79%	–							
Foreign Large Growth	-0.25%	7.87%	25.36%	-2.52%	6.01%	5.93%	Total funds in category		396	380	334	222		

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Investment performance

AS OF OCTOBER 31, 2024

	Average annual total returns							Inception date	Percentile rankings				Expense ratio (net/gross)	Expense limit expiration date
	Three month	Year to-date	One year	Three year	Five year	Ten year	Since inception		One year	Three year	Five year	Ten year		
Diversified Emerging Mkts														
INVESCO DEVELOPING MARKETS R6	0.40%	3.79%	13.33%	-6.50%	0.34%	1.85%	4.02%	12/29/2011	94	85	93	82	0.88/0.88	–
MSCI Emerging Markets NTR Index	3.58%	11.66%	25.32%	-1.43%	3.93%	3.43%	–							
ACADIAN EMERGING MARKETS I	1.42%	14.79%	29.10%	4.48%	7.78%	4.72%	6.97%	10/31/2016	11	6	11	19	1.1/1.24	03/2025
MSCI Emerging Markets NTR Index	3.58%	11.66%	25.32%	-1.43%	3.93%	3.43%	–							
Diversified Emerging Markets	2.32%	9.43%	23.07%	-1.74%	4.25%	3.22%	Total funds in category		793	709	637	426		
Intermediate Core Bond														
ALLSPRING CORE BOND INST	0.27%	2.21%	11.08%	-2.13%	0.03%	1.58%	3.77%	10/31/2001	33	39	35	33	0.38/0.48	08/2025
Bloomberg U.S. Aggregate Bond Index	0.25%	1.86%	10.55%	-2.20%	-0.23%	1.49%	–							
Intermediate Core Bond	0.27%	2.18%	10.57%	-2.14%	-0.12%	1.42%	Total funds in category		475	431	387	273		
Intermediate Core-Plus Bond														
TCW METWEST TOTAL RETURN BD I	-0.02%	1.73%	11.61%	-2.79%	-0.20%	1.49%	4.71%	03/31/2000	60	84	74	66	0.45/0.45	–
Bloomberg U.S. Aggregate Bond Index	0.25%	1.86%	10.55%	-2.20%	-0.23%	1.49%	–							
DODGE & COX INCOME I	0.30%	3.00%	12.44%	-0.42%	1.49%	2.57%	5.94%	01/03/1989	22	8	7	8	0.41/0.41	–
Bloomberg U.S. Aggregate Bond Index	0.25%	1.86%	10.55%	-2.20%	-0.23%	1.49%	–							
FEDERATED HERMES TOTAL RETURN BOND IS	0.53%	2.49%	11.21%	-1.95%	0.79%	2.14%	4.71%	10/01/1996	73	53	25	23	0.39/0.46	02/2025
Bloomberg U.S. Aggregate Bond Index	0.25%	1.86%	10.55%	-2.20%	-0.23%	1.49%	–							
Intermediate Core-Plus Bond	0.45%	2.85%	11.69%	-1.88%	0.31%	1.70%	Total funds in category		586	529	489	353		
Infrastructure														
LAZARD GLOBAL LISTED INFRASTRUCTURE INST	0.11%	6.54%	16.88%	7.23%	6.37%	8.71%	10.15%	12/31/2009	93	10	18	3	0.97/0.97	–
Infrastructure	3.35%	10.13%	25.77%	3.35%	6.20%	5.66%	Total funds in category		105	95	84	57		
Real Estate														
COHEN & STEERS INSTL REALTY SHARES	5.58%	12.96%	36.01%	1.22%	5.68%	7.79%	10.94%	02/14/2000	22	17	12	5	0.75/0.76	–
FTSE NAREIT All Equity REITs Index	5.04%	10.11%	34.09%	-0.05%	4.09%	6.72%	–							
Real Estate	4.91%	10.18%	33.39%	-0.72%	3.53%	5.63%	Total funds in category		234	225	206	152		

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Investment performance

AS OF OCTOBER 31, 2024

	Average annual total returns							Inception date	Percentile rankings				Expense ratio (net/gross)	Expense limit expiration date
	Three month	Year to-date	One year	Three year	Five year	Ten year	Since inception		One year	Three year	Five year	Ten year		
Commodities Broad Basket														
ALPS/CORCMDTY MGMT CMPLTCMDTY STRAT I	0.40%	2.34%	0.67%	1.71%	8.79%	1.33%	1.66%	06/29/2010	48	73	39	33	1.15/1.21	02/2026
Bloomberg Commodity Index	2.97%	3.89%	-1.18%	2.15%	6.96%	-0.08%	–							
Commodities Broad Basket	1.72%	4.78%	1.13%	3.87%	8.17%	0.66%	Total funds in category		107	98	94	63		
Money Market-Taxable														
FEDERATED HERMES GOVT OBL PREMIER	1.27%	4.40%	5.32%	3.65%	2.31%	–	1.65%	01/06/2015	–	–	–	–	0.15/0.24	10/2025
ICE BofA USD 3M Dep OR CM TR USD	1.40%	4.62%	5.58%	3.64%	2.49%	1.88%	–							
Money Market-Taxable	1.18%	4.14%	5.02%	3.40%	2.13%	1.43%	Total funds in category		586	551	510	–		

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Important information

Important information

Alpha - The difference between an investment's actual returns and its expected performance, given its level of risk (as measured by beta).

Beta - An investment's sensitivity to market movements.

R-Squared - Ranges from 0 to 100 and reveals how closely an investment's returns track those of a benchmark index.

Standard Deviation - Measures how much an investment's returns are likely to fluctuate.

Sharpe Ratio - Measures how an investment balances risks and rewards. The higher the Sharpe ratio, the better the investment's historical risk-adjusted performance.

Excess Return - The difference between a manager's return and the return of an external standard such as a passive index.

Tracking Error - The standard deviation or volatility of excess returns.

Percentile rankings are based on total returns in accordance with the appropriate Morningstar peer group. Returns shown for periods of less than one year are not annualized. All returns displayed here are after Total Investment Expense of the investment option. Investment options are subject to investment risk. Shares or unit values will fluctuate and investments, when redeemed, may be worth more or less than their original cost.

Important information

Before investing, carefully consider the investment option objectives, risks, charges, and expenses. Contact a financial professional or visit principal.com for a prospectus or, if available, a summary prospectus containing this and other information. Please read it carefully before investing.

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Important information

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- Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested

Investment Policy Review

5b

TSC Southmost College Foundation

Investment Policy

Introduction

The purpose of this document is to provide a basis for the TSC Southmost College Foundation through its Board of Trustees to discharge properly its responsibilities with respect to the maintenance and enhancement of investment funds of the Foundation.

It is intended that the policy, philosophies, and other guidelines stated herein will be reviewed by the Investments Committee, and the Board of Trustees periodically, but at a minimum of every two years, and will be updated and modified as required to recognize current market and economic conditions as well as the current income needs of the Foundation.

In considering and managing endowment funds, the TSC Southmost College Foundation will adhere to the Texas Uniform Prudent Management of Institutional Funds Act (UPMIFA), enacted in 2007 per Texas Property Code Chapter 163.

Goals

It shall be the policy of the TSC Southmost College Foundation to manage investment funds of the Foundation in such a manner that will:

- Provide funds to the Foundation to support the current goals and objectives of the Foundation;
- Preserve and maintain the value of all assets as measured in real, inflation-adjusted terms;
- Optimize, over the long run, the total rate of return on investable assets, minimizing the level of risk assumed by the Foundation, and
- Maintain a low-level investment risk for any funds, which may have an immediate or short-term use such as Capital/Major Gifts Campaign, Special Projects, Direct, or other appropriate funds.

Investment Philosophy

The TSC Southmost College Foundation's investment portfolio (the "Fund") shall be managed with the intention of obtaining the highest possible "total return" (i.e., current income plus net realized and unrealized appreciation expressed as a percentage of market value) for the Fund while adhering to a prudent level of risk.

Capital/Major Gifts Campaign, Special Projects, Direct and Other Short-Term Managed Funds:

The TSC Southmost College Foundation shall invest these funds in a short-term, two-year or less limited-risk investments such as certificate of deposit(s), U.S. Treasury bills or bonds, or money market account(s). These investments may earn interest and/or dividend. The value of the funds raised shall not be in jeopardy of being reduced by factors such as current market value or realized loss.

Short-Term Only Fund Descriptions for funds to be considered:

- Direct Funds: Funds provided to the Foundation for specific allocations such as direct scholarships or equipment. In such cases, the donor has not agreed to investment risk nor would the funds receive any earnings.
- Grant Funds: Funds provided to the Foundation for specific allocations based on grants or donor proposals. Funds can include any allocation such as direct scholarships or equipment

funds, but the donor has not agreed to investment risk nor would the funds receive any earnings.

- Designated Scholarship Funds: Fund provided to the Foundation to provide scholarships for designated students. These funds are held in a pass-through fund until they can be distributed to the students.

Short-Term Fund Descriptions with potential partial Long-Term investment allocation

- Capital Gift Funds: Funds provided to the Foundation for capital improvements and/or equipment purchase. Once initial campaign initiatives are fulfilled with no short-term expenditures pending, fund balance can be allocated under long-term investment strategy
- Special Project Funds: Funds generated from special, as a Foundation generated resources, a portion of these funds can be designated for long-term investment following fulfillment of all short-term obligations.

Long-Term Fund Descriptions:

- Endowed Funds: Funds provided to or designed by the Foundation for any allocation wherein the corpus of the fund is entrusted to the Foundation for investment with the income of said investment to fund the stated objectives.

Investment Authority

The Investments Committee of the Foundation (the “Committee”) along with the Investment Advisor (if appropriate) shall be responsible for the investment and reinvestment of the TSC Southmost College Foundation’s Fund. Action taken shall follow the Investment Policy Guidelines. The Committee for Investments/Finance shall have the following authority and responsibilities to act on behalf of the Board of Trustees in connection with the investment of these funds.

- Establishment of investment policies and objectives for Board of Trustees approval
- Allocation of funds among equity, fixed-income, and various other investment alternatives as deemed appropriate
- Recommendation to the Board of Trustees regarding the hiring and termination of relationships with outside Portfolio Manager(s) based on their performance and the Investment Policies
- Periodic review of Portfolio Manager(s), with regard to performance results, investment activity, and adherence to policy

In implementing this Investment Policy Statement (“Policy Statement”), the Board may delegate certain functions to:

1. An investment advisor (“Advisor”) to assist the Committee in the investment process and to maintain compliance with this Policy Statement. The Advisor may assist in establishing investment policy objectives and guidelines. The Advisor will adjust asset allocation for the Fund subject to the guidelines and limitations set forth in this Policy Statement. The Advisor will also select investment managers (“Managers”) and strategies consistent with its role as a fiduciary for the Fund. The investment vehicles allowed may include mutual funds, commingled trusts, separate accounts, limited partnerships and other investment vehicles deemed to be appropriate by the Advisor. The Advisor is also responsible for monitoring and reviewing investment managers; measuring and evaluating performance; and other tasks as deemed appropriate in its role as Advisor for Fund assets. The Advisor may also select investments with discretion to purchase, sell, or hold specific securities, such as Exchange Traded Funds, that will be used to meet the Fund’s investment

objectives. In cases where the Advisor does not take possession of securities, cash or other assets of the Fund, the Foundation will enter into a separate custodial agreement with a firm of their selection to hold assets of the Fund. The Advisor must be registered with the Securities and Exchange Commission. The advisor must provide an update of the financial position of the holding 15 days after each quarter, or within 15 days of a loss of 5% of the portfolio value in any one day. A standard form of realized earnings and unrealized earnings as well as any deposits and withdrawals from the account will also need to be provided.

2. Investment Managers. Under unique circumstances, or as directed by donor restrictions, the TSC Southmost College Foundation may utilize the services of external Manager(s) outside the discretion of the Advisor to assist in the management of the Fund. The number of managers and the amount of funds under their management shall be determined by the Investments Committee with periodic review and approval by the Board of Trustees. The Foundation will internally manage those funds that because of size or value cannot feasibly or economically be managed by external advisors.

When utilized, Manager will be selected from strongly established and financially sound organizations that have a proven and demonstrated record in managing funds consistent with the needs of the Foundation. Selection of Managers will depend on factors established by the Investments Committee. The services to be provided by Manager shall be specified in written agreement(s).

3. A custodian selected by the Fund to maintain possession of physical securities and records of street name securities owned by the Fund, collect dividend and interest payments, redeem maturing securities, and effect receipt and delivery following purchases and sales. The custodian may also perform regular accounting of all assets owned, purchased, or sold, as well as movement of assets into and out of the Fund.
4. A trustee appointed by the Fund (if needed), such as a bank trust department, if the Fund does not have its own Trustees, to assume fiduciary responsibility for the administration of Fund assets; provided, however, that if the Board shall have appointed an investment advisor, then any trustee appointed under this paragraph shall have no authority with respect to selection of investments.
5. Specialists such as attorneys, auditors, actuaries and, retirement plan consultants to assist the Board in meeting its responsibilities and obligations to administer Fund assets prudently.

Gains and Losses

The Foundation recognizes that there will be gains and losses in the management of the Fund and such gains and losses will be recognized and recorded in accordance with Generally Accepted Accounting Principles (GAAP).

Spending Policy

It shall be the policy of the TSC Southmost College Foundation to preserve and maintain the real purchasing power of the principal in the Fund. Accordingly, the current spending policy of the Foundation will be determined annually by the Board of Trustees with recommendations submitted by the Investments Committee.

Short-Term Funds: It shall be the policy of TSC Southmost College Foundation to preserve and maintain the real purchasing power of short-term funds raised. Accordingly, the funds will only

be released to fulfill the donor's objective.

Expenditures: In the spending of all Foundation funds, no disbursements will be made payable to cash or bearer, except in the case of checks for petty cash not to exceed \$1,000.00 to accommodate foundation operations, nor will blank checks be permitted. No personal loans will be made from funds raised.

In addition, seven criteria will guide the Foundation in its yearly expenditure decisions:

1. The duration and preservation of the endowment fund;
2. The mission of the Foundation and its Fund;
3. General economic conditions;
4. Possible effect of inflation or deflation;
5. The expected total return from income and the appreciation of investments;
6. Other resources of the Foundation; and,
7. The Policy Statement of the Foundation

Other Guidelines

- Portfolio Manager(s) are generally authorized to vote proxies on the Foundation's behalf. In cases in which the Foundation desires to vote proxies related to specific topics, it will notify Portfolio Manager(s).
- Securities lending is not authorized.
- In general, Portfolio Managers should avoid any transaction that could generate unrelated business income tax (UBIT).
- Except as otherwise noted, the Foundation committee on Investments/Finance shall be authorized to implement and administer this policy on behalf of the Board of Trustees and administer the Fund in accordance with this policy.

Investment Policy Guidelines

Mindful of its fiduciary responsibility, the Board of Trustees of the TSC Southmost College Foundation has adopted the following investment management guidelines. The guidelines apply to those gifts and donations in the form of endowments; those monies set aside by the Board as designated endowments; those contributions received for the current fund, capital funds, and other contributions.

Investments will generally be limited to those firms and/or instruments which adhere to the standards of these guidelines, and which meet the standards of a prudent investor.

The objective of these investment management guidelines is to ensure the future growth of the endowment sufficient to offset normal inflation plus reasonable spending, thereby preserving the constant-dollar value and purchasing power of the endowment for future generations, and to preserve the principal of Board designated funds, operating cash, reserves, and short-term funds while producing market-level income.

Investment Guidelines

A. Risk Tolerance and Investment Time Horizon

The Foundation's endowment assets will have a long-time life span which parallels the life of the institution. As such, these funds can assume a life that extends well beyond a normal market cycle. Therefore, an above average level of risk as measured by the standard deviation of annual returns may occur. However, by careful management and sufficient portfolio diversification, there will be lessened volatility in the investments, which will help to assure a reasonable consistency of return.

Short-term fund will be held in limited-risk investment vehicles.

B. Performance Expectations and Hurdle Rate

Over the long-term, five years or longer, the performance objective for the Fund will be to achieve an average total annual rate of return that is equal to or greater than the Fund's Hurdle Rate of 7.5%. Additionally, it is expected that the annual rate of return on Fund assets will be commensurate with the then prevailing investment environment. Measurement of this return expectation will be judged by reviewing returns in the context of industry standard benchmarks, peer universe comparisons for individual Fund investments and blended benchmark comparisons for the Fund in its entirety.

C. Long-Term Asset Allocation

Within this section of the Policy Statement, several terms will be used to articulate various investment concepts. The descriptions are meant to be general and may share investments otherwise considered to be in the same asset class. They are:

"Growth Assets" - a collection of investments and/or asset classes whose primary risk and return characteristics are focused on capital appreciation. Investments within the Growth Assets category can include income and risk mitigating characteristics, so long as the predominant investment risk and return characteristic is capital appreciation. Examples of such investments or asset classes are: domestic and international equities or equity funds, private or leveraged equity, certain real estate investments, and hedge funds focused on equity risk mitigation or equity-like returns.

"Income Assets" - a collection of investments and/or asset classes whose primary risk and return characteristics are focused on income generation. Investments within the Income Assets category can include capital appreciation and risk mitigating characteristics, so long as the primary investment risk and return characteristic is income generation. Examples of such investments or asset classes are: fixed income securities, guaranteed investment contracts, certain real estate investments, and hedge funds focused on interest rate risk mitigation or income investment-like returns.

"Real Return Assets" - a collection of investments and/or asset classes whose primary risk and return characteristics are focused on real returns after inflation. Investments within the Real Return category can include inflation protected securities, commodities, certain real estate investments and hedge funds.

Liquidity and Diversification

In general, the Fund may hold some cash, cash equivalent, and/or money market funds for near-term Fund spending needs and expenses (the "Fund Distributions"). Remaining assets will be invested in longer-term investments and shall be diversified with the intent to minimize the risk of long-term investment losses. Consequently, the total portfolio will be constructed and maintained to provide diversification with regard to the concentration of holdings in individual issues, issuers, countries, governments or industries.

Asset Allocation

The Board believes that to achieve the greatest likelihood of meeting the Fund's investment objectives and the best balance between risk and return for optimal diversification, assets will be invested in accordance with the targets for each asset class as follows to achieve an average total annual rate of return that is equal to or greater than the

Fund's target rate of return over the long-term, as described in the section titled "Performance Expectations".

<u>Asset Classes</u>	<u>Asset Weightings</u>	
	<u>Range</u>	<u>Target</u>
Growth Assets		
Domestic Equity	26% - 66%	40%
International Equity	4% - 44%	25%
Other	0% - 20%	0%
Income Assets		
Fixed Income	10% - 50%	30%
Other	0% - 20%	0%
Real Return Assets	0% - 20%	0%
Cash Equivalents	0% - 20%	5%

The Advisor and each Manager will be evaluated against their peers on the performance of the total funds under their direct management.

Rebalancing Philosophy

The asset allocation range established by this Policy Statement represents a long-term perspective. As such, rapid unanticipated market shifts or changes in economic conditions may cause the asset mix to fall outside Policy Statement ranges. When allocations breach the specified ranges, the Advisor will rebalance the assets within the specified ranges. The Advisor may also rebalance based on market conditions.

D. Short-Term Asset Allocation

Short-term funds will be deposited into the checking account(s), and then invested in vehicles that are appropriate to the use of these funds. When placing short-term assets with the external portfolio manager/s, the Foundation staff shall indicate those funds that are to be allocated to short-term investments.

- **Reserve Fund:** The Foundation may establish a reserve fund comprised of 5% of endowment fund corpus when determining balances for awards. The reserve fund may be funded through excess returns over the Hurdle Rate of return, as recommended over time by Advisor, and set aside for spending during times of market downturns.

E. Restricted Investments

As a normal course, donors will be encouraged to entrust gifts to the institution without restriction of the investment of these funds, and the Foundation may, from time to time, determine that the refusal of such restrictions, and the gift, is more prudent than acquiescence. The Foundation may accept restrictions or recommendations for investments from donors at the discretion of the TSC Southmost College Foundation on a case-by-case basis per the recommendation of the Investments Committee.

F. Spending

It is the Foundation's goal to distribute annually four percent (4%) of the endowment corpus based on a 7 year rolling average, with the amount not to exceed the accumulated

growth of the fund. At a minimum the interest and dividends will be distributed. Other funds will be spent in accordance with donor request and/or as appropriate to fulfill purpose for which funds were obtained.

Exceptions

Modifications and exceptions to this policy shall be authorized only by the Board of Trustees or as provided herein. The terms and conditions of this policy may be waived if specified by the terms of any gifts received, if approved by the Board of Trustees.

Guidelines for Portfolio Holdings

Direct Investments by Advisor

Every effort shall be made, to the extent practical, prudent and appropriate, to select investments that have investment objectives and policies that are consistent with this Policy Statement (as outlined in the following sub-sections of the “Guidelines for Portfolio Holdings”). However, given the nature of the investments, it is recognized that there may be deviations between this Policy Statement and the objectives of these investments.

Limitations on Managers’ Portfolios

EQUITIES

No more than the greater of 5% or weighting in the relevant index (Russell 3000 Index for U.S. issues and MSCI ACWI ex-U.S. for non-U.S. issues) of the total equity portfolio valued at market may be invested in the common equity of any one corporation; ownership of the shares of one company shall not exceed 5% of those outstanding; and not more than 40% of equity valued at market may be held in any one sector, as defined by the Global Industry Classification Standard (GICS).

Domestic Equities. Other than the above constraints, there are no quantitative guidelines as to issues, industry or individual security diversification. However, prudent diversification standards will be developed and maintained by the Manager.

International Equities. The overall non-U.S. equity allocation should include a diverse global mix that is comprised of the equity of companies from multiple countries, regions and sectors.

FIXED INCOME

Fixed income securities of any one issuer shall not exceed 5% of the total bond portfolio at time of purchase. The 5% limitation does not apply to issues of the U.S. Treasury or other Federal Agencies. The overall rating of the fixed income assets as calculated by the Advisor shall be investment grade, based on the rating of one Nationally Recognized Statistical Rating Organization (“NRSRO”).

OTHER ASSETS (ALTERNATIVES)

Alternatives may consist of non-traditional asset classes such as hedge funds, private equity, real estate and commodities, when deemed appropriate. The total allocation to this category may not exceed 30% of the overall portfolio.

Hedge Funds: Primary objective shall be to enhance the risk-return profile of the overall portfolio. This can be accomplished by using a combination of hedge fund strategies that may enhance returns at a reasonable level of risk or reduce volatility while providing a reasonable level

of return. These asset classes may differ from traditional public market asset classes due to the use of certain strategies including short-selling, leverage, and derivatives. Hedge funds may also invest across asset classes. The use of direct hedge funds and fund-of-hedge funds are allowed. For purposes of asset allocation targets and limitations, single strategy hedge funds will be categorized under the specific asset class of the fund. For example, a long/short U.S. equity fund will be categorized as “Other” in the Growth Assets category while a long/short credit fund will be categorized as “Other” in the Income Assets category. Multi-strategy hedge funds that cannot be easily categorized under one asset class will be included in “Other” under either the Growth Assets or Income Assets category depending on the risk-return profile of the strategy.

Private Equity: Private equity is less liquid than publicly traded equity securities and can provide returns that are greater than what is available in publicly traded markets. The private equity portfolio may include investments in a variety of commingled/partnership and direct investment vehicles including, but not limited to, venture capital, buyout, turnaround, mezzanine, distressed security, and special situation funds. The private equity portfolio is recognized to be long-term in nature and highly illiquid. Due to their higher risk, private equity investments are expected to provide higher returns than publicly traded equity securities. For purposes of asset allocation targets and limitations, these funds will be categorized as “Other” under the Growth Assets category.

Real Estate: Consists of publicly traded Real Estate Investment Trust (“REIT”) securities and/or non-publicly traded private real estate and shall be diversified across a broad array of property types and geographic locations. Investments of this type are designed to provide a stable level of income combined with potential for price appreciation, particularly in periods of unexpected inflation. For private real estate, the illiquid, long-term nature should be considered. For purposes of asset allocation targets and limitations, publicly traded REITs will be categorized as “Other” under the Growth Assets category. Depending on the investment characteristics of a private real estate fund, the fund will be categorized as “Other” under either the Income Assets category, for example, a core real estate fund, or under the Growth Assets category, for example, an opportunistic real estate fund where capital gains are expected to make up a significant portion of the total return.

Inflation Hedge: Shall consist of pooled vehicles holding among other assets: Treasury Inflation Protected Securities (“TIPS”), commodities or commodity contracts, index-linked derivative contracts, certain real estate or real property funds and the equity of companies in businesses thought to hedge inflation. Inflation hedge assets will be reported in the Real Return Assets category.

CASH EQUIVALENTS

Cash equivalents shall be held in funds complying with Rule 2(a)-7 of the Investment Company Act of 1940.

Portfolio Risk Hedging

Portfolio investments designed to hedge various risks including volatility risk, interest rate risk, etc. are allowed to the extent that the investments are not used for the sole purpose of leveraging Fund assets. One example of a hedge vehicle is an exchange traded fund (“ETF”) which takes short positions.

Prohibited Investments

Except for purchase within authorized investments, securities having the following characteristics

are not authorized and shall not be purchased: letter stock and other unregistered securities, direct commodities or commodity contracts, or private placements (with the exception of Rule 144A securities). Further, derivatives, options, or futures for the sole purpose of direct portfolio leveraging are prohibited. Direct ownership of natural resource properties such as oil, gas or timber and the purchase of collectibles is also prohibited. Donated assets in these classes will be accepted on a case by case basis as will retention of such assets which will be at the will of the Foundation with consultation from the Advisor.

Safekeeping

All assets of the Fund shall be held by a custodian approved by the Board for safekeeping of Fund assets. The custodian shall produce statements on a monthly basis, listing the name and value of all assets held, and the dates and nature of all transactions in accordance with the terms in the Fund Agreement. Investments of the Fund not held as liquidity or investment reserves shall, at all times, be invested in interest-bearing accounts. Investments and portfolio securities may not be loaned.

Control Procedures, Reporting and Accountability

It is expected that the Advisor shall report not less than quarterly on the performance of the Fund, including comparative gross returns for the funds and their respective benchmarks, as well as a complete accounting of all transactions involving Foundation funds under management during the quarter, together with a statement of beginning balance, fees, capital appreciation, income and ending balance for each account.

Professional investment management shall report routinely to the Executive Director of Development, at least twice annually in person to the Foundation's Investments Committee, and as needed to recommend changes to the Investment Policy. Additional meetings with the Committee or the Board may be requested.

Review of Investment Performance

The Advisor shall report on a quarterly basis to the Board or Committee to review the investment performance of the Fund. In addition, the Advisor will be responsible for keeping the Board or Committee advised of any material change in investment strategy, Managers, and other pertinent information potentially affecting performance of the Fund.

The Advisor shall compare the investment results on a quarterly basis to appropriate peer universe benchmarks, as well as market indices in both equity and fixed income markets. Examples of benchmarks and indexes that will be used include the Russell 3000 Index for broad U.S. equity strategies; S&P 500 Index for large cap U.S. equities, Russell 2000 Index for small cap U.S. equities, MSCI ACWI ex-U.S. Index for broad based non-U.S. equity strategies; MSCI Europe, Australasia, and Far East (EAFE) Index for developed markets international equities, Barclays Capital Aggregate Bond Index for fixed income securities, and the U.S. 91 Day T-bill for cash equivalents. The Russell 3000 Index will be used to benchmark the U.S. equities portfolio; the MSCI ACWI ex-U.S. Index will be used to benchmark the non-U.S. equities portfolio; the Barclays U.S. Aggregate Bond Index will be used to benchmark the fixed income portfolio. The categories "Other" will be benchmarked against appropriate indices depending on the specific characteristics of the strategies and funds used.

Manager performance evaluation will occur continuously. Recommendations for retention, dismissal or a call for an RFP for services shall be presented to the Board of Trustees for approval annually or as needed based on the Committee's evaluation of performance.

The Chair of the Investments/Finance Committee shall make a report to the Board of Trustees at each regular meeting on the status of Foundation investments.

This policy is approved for implementation.

Approval:

Adopted this 12th day of July, 2017.

Nikhil H. Shah

Nikhil H. Shah
Investments Committee Chair

Attest:

Tara Rios
President, Board of Trustees

A large, stylized handwritten signature in black ink, likely belonging to Tara Rios, the President of the Board of Trustees.

Amethyst Gala Update

6a

2025 TSC FOUNDATION AMETHYST GALA SPONSORSHIP OPPORTUNITIES

Double Amethyst Scorpion - **\$10,000**

Exclusive table for 10. Includes bar service, valet parking and VIP seating location.

Amethyst Scorpion - **\$5,000**

Exclusive table for 8. Includes bar service, valet parking and VIP seating location.

Gold Scorpion - **\$3,000**

Exclusive table for 8. Includes preferred seating location.

Silver Scorpion - **\$2,000**

Exclusive table for 8.



TO SPONSOR
OR DONATE,
scan or visit
tsc.edu/amethyst



Each sponsorship opportunity includes an exclusive table, social media and media release recognition before and after event, plus promotional visibility in the official gala program and digital displays at the venue during the event.



TSC FOUNDATION

The mission of the Texas Southmost College Foundation is to transform the lives of students by providing equal opportunities of accessing a quality, affordable college education. The Foundation supports the college and its students in attainment of their educational goals by providing support for student scholarships, academic instruction, and instructional support for students. A local, volunteer Board of Directors governs the Foundation which is a 501(C)(3) non-profit organization.

The TSC Foundation is classified as a tax exempt 501 (c)(3) organization under the Internal Revenue Code and our tax ID number is 74-2338565. Your contribution may be tax deductible to the fullest extent of the law.

SAVE *the* DATE

TSC FOUNDATION
presents

AMETHYST *Gala*



April 12, 2025
6:30 PM – MIDNIGHT

TSC JACOB BROWN AUDITORIUM
600 INTERNATIONAL BLVD.,
BROWNSVILLE



FOR SPONSORSHIP AVAILABILITY,
PLEASE CALL 956-295-3393

2024 - 2025
TSC FOUNDATION
BOARD OF
DIRECTORS

Roy De los Santos
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Adela Garza*
Vice Chair

Norma Hinojosa
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Maru de la Paz

Roel Rodriguez

Delia Sáenz*

Jose Salazar

Nikhil “Nick” Shah

* TSC Board of Trustee



Greetings!

The Texas Southmost College (TSC) Foundation was created to support Texas Southmost College and its students in attainment of their educational goals by providing support for student scholarships, academic instruction, and instructional support for students. A local, volunteer Board of Directors governs the Foundation, which is a 501 (c)(3) non-profit organization.

We serve as proud members of the TSC Foundation Board, and we ask for your support of our 2025 Amethyst Gala. Your support will go a long way in helping students achieve their goal of earning a college education at Texas Southmost College, as we are the most affordable institution of higher education when comparing the first two years of coursework with other colleges and universities in the Rio Grande Valley.

This academic year, the TSC Foundation will award \$400,000 to Texas Southmost College students. Data shows that TSC Foundation scholarship recipients achieve even greater success as compared to other TSC students. Foundation scholarship students have a higher persistence rate from the fall to the spring semester (95% to 80%) and a higher grade point average (3.4 to 2.8).

The TSC Foundation has set a fundraising goal of \$500,000! With your support, we are confident we can meet the goal so that we can serve even more deserving TSC students next year.

To help us meet this goal, we are organizing the 2025 Amethyst Gala (www.tsc.edu/amethyst), will be held at the Jacob Brown Auditorium, on Saturday, April 12, 2025. Sponsorships are available for an exclusive table and includes a cocktail hour and formal dinner featuring an open bar, three course meal, coffee bar, live music, dancing, silent auction, chance to win a liquor cart, and lots of fun.

We respectfully ask for your support to help us meet our fundraising goal of \$500,000 by sponsoring a table at the Amethyst Gala. As a reminder, the TSC Foundation is classified as a tax exempt 501 (c)(3) organization under the Internal Revenue Code and our tax ID number is 74-2338565. Your contribution may be tax deductible to the fullest extent of the law.

Please do not hesitate to contact Dr. Stella Garcia if you have any questions about the Gala or would like to provide other financial support to the Texas Southmost College Foundation. Dr. Garcia can be reached at 956-295-3394 (office) or 956-455-9633 (cell) or via email at stella.garcia@tsc.edu.

Thank you in advance for supporting Texas Southmost College students!

Sincerely,

Roy De los Santos
Chair

Adela Garza
Vice Chair

Jesús Roberto Rodríguez
CEO

2025 TSC FOUNDATION AMETHYST GALA
SPONSORSHIP OPPORTUNITIES

Join us for an elegant evening including a cocktail hour and formal dinner with an open bar, live music by Rockstar Denied, dancing, a chance to win a liquor cart, and a silent auction as the Texas Southmost College Foundation hosts its Amethyst Gala. All funds raised will help deserving students achieve their educational dreams.

Double Amethyst Scorpion - \$10,000

Exclusive table for 10. Includes bar service, valet parking and VIP seating location.a

Amethyst Scorpion - \$5,000

Exclusive table for 8. Includes bar service, valet parking and VIP seating location.

Gold Scorpion - \$3,000

Exclusive table for 8. Includes preferred seating location.

Silver Scorpion - \$2,000

Exclusive table for 8.



TO SPONSOR
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tsc.edu/amethyst

Each sponsorship opportunity includes an exclusive table, social media and media release recognition before and after event, plus promotional visibility in the official gala program and digital displays at the venue during the event.

Name	
Business/Organization	
Address	
City/State/Zip	
Phone	
Email	

✓	Sponsorship Level	Sponsorship Fee
<input type="checkbox"/>	Double Amethyst Scorpion	\$10,000
<input type="checkbox"/>	Amethyst Scorpion	\$5,000
<input type="checkbox"/>	Gold Scorpion	\$2,500
<input type="checkbox"/>	Silver Scorpion	\$1,500

You may pay online at www.tsc.edu/amethyst or mail check to Texas Southmost College Foundation, 80 Fort Brown, Brownsville, Texas 78520, 956-295-3393.

Please email your logo to tscfoundation@tsc.edu no later than April 4, 2025, to be included in the Program, social media, and other sponsor recognitions.

The TSC Foundation is classified as a tax exempt 501 (c)(3) organization under the Internal Revenue Code and our tax ID number is 74-2338565. Your contribution may be tax deductible to the fullest extent of the law.

TSC FOUNDATION

INVITES YOU TO ATTEND *the*
DONOR MEET AND GREET

DATE & TIME

THURSDAY
JANUARY 30, 2025
6:00 P.M.



LOCATION

TSC PERFORMING ARTS
CENTER LOBBY
**90 TAYLOR AVENUE,
BROWNSVILLE, TX
78520**

EMAIL TSCFOUNDATION@TSC.EDU TO RSVP



[CLICK HERE TO VIEW THE MAP](#)



Gala Committee

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Mariachi Festival Committee Report

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Mariachi Festival Committee

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Update

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Alumni Committee

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**Executive Committee
Meeting -- January 29, 2025,
at 12:00 pm**

10a

Donor Meet and Greet Event -- January 30, 2025, at 6:00 pm

10b

Board of Directors Meeting - - February 19, 2025

10c
