SINCE 1872

2022 - 2023

CONCORD UNIVERSITY FOUNDATION, INC.

# ANNUAL FINANCIAL REPORT

concord.edu

Concord University Office of Advancement PO Box 1000 Athens, WV 24712



# 2022-2023 ANNUAL FINANCIAL REPORT

# MISSION

The Concord University
Foundation, Inc. was
established in 1974 as a nonprofit 501(c)(3) organization
whose mission is to grow
charitable resources,
enhance the University's
reputation, and strengthen
relationships with alumni
and friends of Concord.

Governed by a dedicated board of directors, we are committed to responsible stewardship of the gifts entrusted to us by our many donors. Through the generosity of these alumni, parents, faculty, staff, individuals, foundation and corporate friends, the CU Foundation continues to grow to support the needs of Concord University and its students. Through the generosity of countless donors, the Concord University Foundation now has over \$51 million in assets.

### CONTENTS

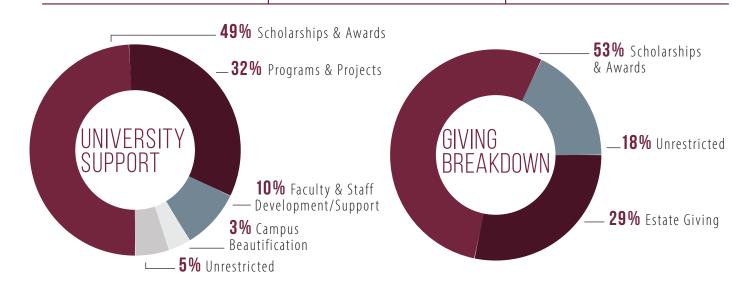
YEAR IN REVIEW **03**FOUNDATION BOARD **04**FINANCIALS **05**FUNDS & SCHOLARSHIPS **09**DONOR HONOR ROLL **14**MEMORIAL GIFTS **18**MOUNTAIN LION CLUB **20** 

# FOUNDATION YEAR IN REVIEW









TOTAL SUPPORT **\$1,739,430** 

TOTAL CASH/STOCK GIFTS \$876,005

# FEATURED SCHOLARSHIPS & FUNDS

## Pathways Scholarship

For the 2023 Academic Year, Concord University awarded 50 scholarships totaling \$2,000 each.

To date, 190 Concord students have been assisted financially with these scholarships over a 6-year period.

# The Gap Fund

This fund provides small grants to undergraduate students at Concord who have high unmet financial need or could drop out of college due to a personal hardship or emergency.

# CU Food Pantry

This provides CU students who may not always have the resources to buy food or other essential items. The Food Pantry is managed by the Office of Veteran Services. Monetary donations can be made through the CU Foundation.

# R O O T E D in the LOCAL COMMUNITY



# FOUNDATION BOARD

As Concord University expands its offerings to better serve the needs of our region, the Concord University Foundation is changing as well, welcoming new members and leadership to combine with those who have faithfully served on the board of directors for many years. Together, the Foundation can better support the needs of the institution.



**L-R:** Veneicia Lockhart '82, Bill Courson, Dr. Kendra Boggess, President, Jason Lunsford '99, Secretary – Dr. Chuck Becker, Vice Chair – Kevin Powell '89, Jie Chen '99, Eugene Lockhart, Jr. '89, Chair – Jennifer Ware '88, Dr. Jerry Benson '72, Chris Tuck '90, Grace Hurney '12, Christy Elliott Bly '04, Treasurer – Dr. Rosemary Goss '74 **Not pictured:** *David Kirby '79, Omar Aboulhosn '89, Josh Stowers '01, Dipali Nanda '06, Dr. Jerry Beasley, Greg Allen '70, Jack White '61, Jackie Karnes '90, Pat McCormick-Moore, Vic Foti '58, Charlie Pace* 

Jennifer Ware '88 of Princeton, West Virginia is the chair of the board. Ware is a senior vice president and fiduciary division director at Truist Bank Wealth with a responsibility for the trust platform for high net worth clients in several states in the North East region.

Kevin Powell '89 of Winston-Salem, North Carolina is serving as vice chair. Powell is the founder and CEO of Kevin Powell's Automotive and Powersports Group. His dealerships represent nine different franchises with stores in Winston Salem, Greensboro, Charlotte, and Pilot Mountain, North Carolina.

Dr. Chuck Becker of Beckley, West Virginia is serving as secretary. Becker has experience as a controller and small business owner. He recently retired from Concord University as the Vice President for Business and Finance. Prior to that leadership role, he taught accounting at CU.

Dr. Rosemary Goss '74 of Blacksburg, Virginia is serving as treasurer. After receiving her M.S. from Virginia Tech and her Ph.D. from Florida State University, Goss worked as a professor of housing and property management at Virginia Tech from 1976 until 2018.

At the spring board meeting, four new members were confirmed and one previous member returned to board service:

Veneicia Lockhart '82 of Haymarket, Virginia was SVP of Finance and a member of the Executive Leadership Team at the National Rural Electric Cooperative Association (NRECA) in Arlington, Virginia.

Grace Hurney '12 is a member with the law firm of Jackson Kelly PLLC, practicing labor and employment law.

Jason Lunsford '99 is the Director of Retirement Plan Consulting at FORVIS Wealth Advisors.

Pat McCormick-Moore currently serves on the Princeton Community Hospital Board and as a member of the Truist Community Advisory Board.

Dipali Nanda is a Senior Director of Global Client Operations for Pharma and Life Sciences Manufacturing services companies in Southern California.

They join the other members who serve together to support the work of the Foundation. Their bios can be found on the Foundation website.

# FINANCIAL POSITION

### June 30, 2023 and June 30, 2022

These condensed financial statements are derived from audited financial statements of the Foundation. Brown, Edwards & Company issued an unmodified opinion on the Foundations financial statements as of June 30, 2023.

Assets	2023	2022
Cash	503,833	310,202
Contributions Receivable	251,671	301,328
Dividends and interest receivable	19,946	1,689
Other receivable	917	917
Cash restricted for long-term investment and by agency relationships	227,949	366,067
Investments	49,718,591	46,011,742
Inventory	2,493	2,622
Prepaid expenses	39,892	66,664
Property and equipment, net	813	2,048
Funds held in trust by others	711,743	652,949
Total assets	\$51,477,848	\$47,716,228
Liabilities	2023	2022
<b>Liabilities</b> Accounts Payable	<b>2023</b> 125,434	<b>2022</b> 41,314
Accounts Payable	125,434	41,314
Accounts Payable Amounts held on behalf of others	125,434 6,120,741	41,314 5,589,734
Accounts Payable Amounts held on behalf of others Annuity obligations	125,434 6,120,741 28,714	41,314 5,589,734 27,009
Accounts Payable Amounts held on behalf of others Annuity obligations	125,434 6,120,741 28,714	41,314 5,589,734 27,009
Accounts Payable Amounts held on behalf of others Annuity obligations Total Liabilities	125,434 6,120,741 28,714 \$6,274,889	41,314 5,589,734 27,009 \$5,658,057
Accounts Payable Amounts held on behalf of others Annuity obligations Total Liabilities  Net Assets	125,434 6,120,741 28,714 \$6,274,889	41,314 5,589,734 27,009 \$5,658,057
Accounts Payable Amounts held on behalf of others Annuity obligations Total Liabilities  Net Assets Without donor restrictions	125,434 6,120,741 28,714 \$6,274,889 <b>2023</b> 642,240	41,314 5,589,734 27,009 \$5,658,057 <b>2022</b> 516,316

FINANCIALS

# ACTIVITY

### June 30, 2023 and June 30, 2022

Revenues & Other Support	2023	2022
Gifts & Grants	876,005	1,938,192
In-Kind Support	68,988	73,444
Interest & Dividends	1,217,711	768,277
Net Gains on Investments	2,884,383	(7,025,890)
Change in Split Interest Agreements	(3,430)	
Change in Funds Held by Others	58,794	(32,391)
Total Revenues & Other Support	\$5,102,451	(\$4,278,368)

Expenses	2023	2022
University Support		
Student Support	844,542	845,971
Faculty/Staff Development	18,169	26,158
Compensation for Services		8,597
Other Support Expenses	657,334	712,089
Management & General	411,100	328,416
Fundraising	26,518	49,242
Total Expenses	\$1,957,663	\$1,970,473

Change in Net Assets	\$3,144,788	(\$6,248,841)
Net Assets	2023	2022
Beginning	42,058,171	48,307,012
Ending	45,202,959	42,058,171

# FACULTY SUPPORT



"With faculty development funding from the Concord University Foundation, I was able to present in Washington, DC to the National Association for Music Educators National Conference on the challenges of teaching children with ASD in the elementary music classroom. Investment in faculty builds upon our current areas of success and enables the institution to reach for even higher levels of achievement."

### Dr. Jacob Womack

Chair, Department of Fine Arts and Communication Joseph F. Marsh Endowed Associate Professor of Music



# FACILITY UPGRADES

One of the areas where you can see Foundation support in action is through upgrades and improvements to some of our campus facilities.



Summer 2022 marked the conclusion of Phase One fundraising for renovations to the theatre spaces in the Alexander Fine Arts Center. Most of the composition of these spaces were original to the building (which opened in 1970) and were in serious need of some upgrades. Enough funding was secured through this Phase One effort to replace all of the seats in the main theatre, to update the ceiling and flooring, to re-finish the stage and to make some technology upgrades in the H.C. Paul Theatre. The theatre space was closed during the 2022-2023 academic year so that all of these updates could be made. We kicked off the 2023-2024 year with a re-opening of the theatre space, affectionately called "Intermission". This event gave members of the Concord community and the local area the opportunity to see firsthand the improvements that had been made to the space.

Funding for the seats was secured through the A Seat for U campaign and through a grant from the Carter Family Foundation. A few gifts were secured for specific areas in the theatre and those areas were named in recognition of those donors. Those areas include:

The Concord University Alumni Association Balcony

The James D. & Elizabeth W. Jessee Main Stage

The Anderson Family Theatre\*

\*This gift came from the estate of Gary Anderson—a 1978 Concord grad who passed away in 2021. It is through the generosity of donors such as Mr. Anderson, the Jessee's and the CU Alumni Association that we were able to make this renovation a reality and we look forward to continuing to renovate some of the most beloved spaces on Concord's campus through additional fundraising initiatives.





At the "Intermission" event we officially kicked off the second phase of fundraising for the theatre, "Act Two". Gifts received during this campaign will go towards lighting, technical and stage support and new seating in the H.C. Paul Theatre.

Giving opportunities also currently exist for renovations to some of Concord's athletic facilities and our science lab facilities.

For details on Act Two or any of these other donation opportunities, please contact Sarah Turner, Vice President of Advancement at

slturner@concord.edu

# CASH FLOWS

# June 30, 2023 and June 30, 2022

Operating Activities	2023	2022
Changes in Net Assets	3,144,788	(6,248,841)
Adjustments:		
Depreciation	1,235	1,474
Net realized and unrealized (gains) losses on investments	(2,884,383)	7,025,890
Change in value of split interest agreements	3,430	
Change in funds held in trust by others	(58,794)	32,391
Contributions restricted for long-term investment	(494,791)	(1,090,699)
(Increase) decrease in operating assets:		
Contributions Receivable	49,657	14,024
Inventory	129	183
Dividends and interest receivable	(18,257)	(1,069)
Prepaid Expenses	26,772	(34,184)
Increase (Decrease) in:		
Accounts payable	84,120	34,653
Amounts held on behalf of others	531,007	(738,073)
Net Cash provided from (used in) operating activities	\$384,913	(\$1,004,252)
Investment Betwie	2022	2022
Investment Activities	2023	2022
Sales & Maturities of Investments	8,292,203	1,088,151
Purchase of Investments	(9,114,669)	(1,386,937)
Purchase of Office Equipment	(+022-466)	(4222 726)
Net Cash from Investing	( \$822,466 )	(\$298,786)
Financing Activities	2023	2022
Contributions Restricted for long-term investment	494,791	1,090,699
Annuity Agreements	(1,725)	(6,900)
Net Cash provided by financing activities	\$493,066	\$1,083,799
Net increase (decrease) in cash and cash equivalents	\$55,513	(\$219,239)
The mercuse (accrease) in cush and cush equivalents	כו כ,ככי	(7217,237)
Cash & Cash Equivalents	2023	2022
Beginning	676,269	895,508
Ending	731,782	676,269
*Supplemental Disclosure		
Reconciliation of cash, cash equivalents and restricted cash		
to the statements of financial positions:		
·	2023	2022
Cash & Cash Equivalents	503,833	310,202
Restricted cash for long-term investment and by agency relationships	227,949	366,067
	\$731,782	\$676,269



# 2022-2023 FUNDS & SCHOLARSHIPS

July 1, 2022 - June 30, 2023

The Concord University Foundation is proud to manage over 260 funds totaling \$36,513,140.

### New funds for the 2022-2023 fiscal year include:

Susan M. Ford Memorial Scholarship Katrina Nasiru Memorial Scholarship

# SCHOLARSHIP RECIPIENTS

### by Major

Business Administration
20%
Education
22%
Fine Arts
7%
Health & Training
9%
Humanities
22%
Mathematics & Computer Science
4%
Natural Sciences
11%
Nursing
2%
Regents, None Declared
3%

# by Residence





OUT OF STATE

OUT OF STATE

11



### LIST OF FUNDS & SCHOLARSHIPS

Access & Affordability

ACT Scholarship (Dorothy Dunbar Scholarship and Arbutus Heath Scholarship)

Glen M. and Jane Akers Scholarship

Alderman-Given Business Scholarship

Hildred Smith-Allard Music Endowment

Gregory M. Allen Scholarship

**Gregory and Mary Aloia** Veteran Scholarship

Elisabeth "Libby" Alvis Memorial Scholarship

John C. and Ruby Anderson Scholarship

J. W. "Bill" Anderson Scholarship

Sadie Sue Anderson Scholarship

Aramark Scholarship Fund

Michael "Mikey" Atwell Scholarship

BC Book Award (Nancy Shannon Book Fund)

Carl Azzara Music Colloquium Endowment

Carl H. Bailey Scholarship

Elizabeth Brock Bailey Scholarship

James Bailey Scholarship

Virginia Bailey Scholarship

Walter and Phyllis Bailey Memorial Scholarship

Homer K. Ball Memorial Scholarship

Yankee Barbakow Family Scholarship

David Bard Scholarship

The Cynthia Wegley Barnette Nursing Scholarship

The CUAA Laurence E. Bayless Scholarship

BB&T Scholarship Fund

Beasley/Dressler Memorial Scholarship

Henry Clay Beavers Scholarship

Mary Edna Beckett Natural Science Fund

The CUAA Mary Edna Beckett Scholarship

Eddie Bender Scholarship Lester-Bennett Scholarship Arthur J. and Irene K. Benson Scholarship

The CUAA Sue Berger **Everett Scholarship** 

Professor P.C. Bibbee Scholarship

Leola Hoke Bingham Music Scholarship

Eugene Bingham Athletic Scholarship Fund

Louis Bingham Basketball Scholarship

Louis Bingham Football Scholarship

Louis Bingham Teacher Scholarship

Lisa Blankenship Memorial Scholarship

Dr. Jerry Blatt Scholarship

Dr. Jerry Blatt Memorial Fund

**Bluefield Regional Medical** Center Scholarship

Edward Theodore (Ted) Boggess Scholarship

Wayne and Cassandra Bolen Chemistry Fund

The CUAA Bolen Scholarship

S. Boninsegna Scholarship

Hazel Morgan Booth Scholarship

The CUAA Bowman-Fraser Graduate Scholarship

Dr. Branson Scholarship

Joel Brewster Scholarship

CUAA Alumni Brick Project

Ronald Burgher Scholarship

Division of Business International

Travel Scholarship

**Bussard Scholarship** 

**Butcher Minority Trust Fund** 

Arthur Butcher Scholarship

Darrell K. Cales Scholarship

Campus Projects & Infrastructure

Friends of the Carillon and Pipe Organ Fund

**Carter Family Fund** 

Carucci Family Scholarship

William B. Caruth, Sr. Scholarship

William B. Caruth, Jr., and Robert Preston Walters (Memorial Music Scholarship)

Sheila Chipley Scholarship

Harry Christie Scholarship

Cierzniewski Library Fund

William W. and Olivia F. Clark Scholarship

Classified Employees Scholarship

Harry and Shirley Cline Memorial Scholarship

Professor Jim Coiner'60 Advertising & **Graphic Design Scholarship** 

Conn-Weld Industries, Inc. Scholarship Fund

Cook/Rado Scholarship

Clifford E. and Linnie M. Coon Scholarship

**Bruce Covey Mathematics Award** 

Winton Covey Scholarship

Lt. Aaron L. Crook Memorial Scholarship

Cruise/Cabot Eminent Scholar Endowment

George Cruise Foundation Scholarship

David Darnell Athletic Scholarship

The CUAA Caroline Dawson

Ward Scholarship

Frank and Fannie Dean Scholarship

Maxey/Deel Scholarship

Lucy Sneed DeNuzzo Scholarship

Thomas and Charlotte Deskins Scholarship

Mary Lou Dickenson Scholarship

Michael Donato Music Scholarship

Margaret Edmunds Scholarship

George and Dori Edwards

Memorial Scholarship

Princeton Elks Memorial Scholarship

Robert Ellison Scholarship

**Endowment Fund** (General Scholarship Fund)

Concord Faculty Scholarship

Larry Fanning Scholarship

Daniel W. Farley, PhD Scholarship

Tommy M. and Mary J. Farmer Scholarship

Max Mendel Fezer Scholarship Harry Finkelman Scholarship

Five Aces Scholarship

Mike and Mildred (Sowers) Flanigan Scholarship

Arman E. Fletcher Memorial Golf Scholarship

George Floyd Memorial Scholarship

Susan M. Ford Memorial Scholarship

Friedl Faculty Award

Robert Gallione, Jr. Scholarship

Kevin Garrett Baseball Scholarship Thomas Giffen Scholarship

Fred Gilbert Trust

Gilbert High School (Quest II)

Mary Holroyd Sampson

Gillie Scholarship

Girl Scout Gold Award Scholarship

Kenneth V. and Virginia Heimer Gleason Music Scholarship

Golf Tournament Scholarship

Paul Goodof Scholarship

Area of Greatest Need Coach Paul Greer Scholarship

Victor and David Grigoraci Scholarship

Jack Grose/SGA Scholarship

Grace Gumm Scholarship

**Gwinn Family Scholarship** 

Earl Wayne and Rosa Woodring Haga Scholarship

Lucy Epperson Hale Memorial Scholarship

Ruth and Russel Hall Scholarship

The CUAA Hamlett-Smith **Book Waiver Fund** 

The Alice Hannah Latham, Lambert Ellsworth, and Sarah Lee (Sally) Drake Music Scholarship Fund

James H. "Buck" Harless **Business Scholarship** 

Hobart and Pansy Harvey Foundation Scholarship

John C. and Chloe A. Higginbotham Scholarship

Arthur N. Hofstetter Scholarship

Donald and Linda Holcomb Presidential Scholarship

### LIST OF FUNDS & SCHOLARSHIPS

Holcomb Family
Presidential Scholarship

The CUAA Ella Holroyd Scholarship

The Hope Chest Scholarship
Herman Hoskins Scholarship

locanh G. and Mallia Railay

Joseph G. and Nellie Bailey Hunt Scholarship

International Studies Fund

John Jessee Scholarship

Margaret Jones Scholarship

Dr. Paul J Kane

Memorial Lecture Series

Georgia Kelley Scholarship

Kelli Ann Kirby Memorial Scholarship

Ralph Kiser Scholarship

Kroger Scholarship

Kwik Kafe Scholarship

Robert Kyle Athletic Scholarship

Matthew David Lagowski Scholarship
Winnis Hylton Landing Scholarship

Lane Family Scholarship

Louise Leary Delta Kappa Scholarship

J. Franklin Long and Vernon C. Long Scholarship

Glenn and Sandra Lowe Family Scholarship

Lowes Foundation Scholarship

LeRoy Mabe Accounting Scholarship

**Douglas Machesney Scholarship** 

Maier Scholarship

Maier Foundation Retention and Student Success Scholarship

John L. and Mary M. Matherly Scholarship

Clyde and Elizabeth Maxey Scholarship

Erma Jean McAlister Memorial Scholarship

McClanahan Merit Award

Billie Martin

McClaugherty Scholarship

McDowell County Scholarship

Delford McGraw Scholarship

William McKee Scholarship

The CUAA Otto & Kathryn McKinney Memorial Graduate Scholarship

S. Charles and Una M. Melton Scholarship Fund

The Alton Douglas / Mercer Anglers Scholarship

Marguerite Miller Education Scholarship

John Minick III Business Scholarship

B.G. Moore Scholarship

George F. Moore Scholarship Lloyd Moye Scholarship

Lloyd Moye Athletic Scholarship

Mt. View/Welch High School Scholarship

Mountain State Regular Veterans Association Post #57 Scholarship

Katrina Nasiru Memorial Scholarship

Sally Neal Scholarship

Frank Nelson Scholarship

Kristen Osborne Scholarship Lawrence Pace Scholarship

Dr. and Mrs. Albert Paine Scholarship

The John and Lucia Pais Endowed Charitable Fund

Parker Family Scholarship Fund

Mike Pashion Scholarship

Andy Paterno Family Scholarship

CU Pathways Retention Scholarship

David L Pearce Scholarship Fannie and W.D.

Pendleton Scholarship
Robert Pewanick Business Scholarship

Pepsi Scholarship

Diana Delung Perry Scholarship

John Perry Scholarship

Wanda McCoy Perry Scholarship

Joseph Peters Scholarship Peterstown High School Scholarship Phi Sig-Phi Mu Chapter Scholarship

Maxine Poe Scholarship

Henry P. Porter, Senior and Mary Gravatt Porter Memorial Scholarship

H. E. "Skip" Powell Scholarship

Jonathan Powell Hope Foundation Scholarship

Nelrose Richards Price Scholarship

Purser Memorial Endowment

Quest II Foundation Scholarship (Bank One, City National Bank, Gilbert High School, laeger High School, Liberty High School Matching, Pikeview High School- Athens, Princeton High School, United National Bank)

Ella Nash Rainey Scholarship

Kamala Ranganathan Scholarship

Ben Reed Scholarship

Robert Richardson Scholarship

Freida Joy Riley Scholarship
Roanoke/New River Valley Scholarship

Robert Roark Scholarship

William B. and Elizabeth Robertson Scholarship

Mary and J. Therin Rogers Scholarship

Forrest Roles Scholarship Josephine Lilly Rorrer Memorial Scholarship Fund A

Josephine Lilly Rorrer Memorial Scholarship Fund B

David S. Roth Memorial Scholarship

Rupert High School '56 Scholarship Beryle Santon Scholarship

Sharp Memorial Fund

Shott Entrepreneurial Endowment

Shott Faculty Development Anna Lee Campbell

Shumate Scholarship

Cassandra Smith Scholarship

John David Smith Memorial Scholarship

Mary Parker Smith Scholarship

Stanley D. and Brookie H. Smith Scholarship

Arthur and Gladys Smith Pre-Med Scholarship

Emory Smith, Jr. Scholarship
Hildred Smith Music Scholarship Fund

Joseph L. Soto Family Teacher Education Scholarship Patricia Sparks Scholarship

Amanda Knighton
Stafford Scholarship

Woodrow and Eva (Sims)
Stanley Scholarship

Margaret Ann Stradley Scholarship

Allie Irene Strasko Research Endowment

Student Government Association Scholarship

Doug Tanner Scholarship

June Elizabeth Tate Memorial Author Series

Frances and David Taylor Scholarship

Ruth M. Thompson Scholarship

Tierney Endowed Chair of Business Wilma Toothman Scholarship

Unrestricted Funds (Annual Fund)

Tom Walthall Memorial Scholarship

Hassel Ward (Campus Beautification Fund)

Verizon Scholarship

Bill Weber Football Scholarship
Welch High School '52 Scholarship

Welch High School '59 Scholarship

The CUAA Hawey A. Wells Sr. Scholarship

Betty R. White Fine Arts Fund

L. H. and Madeline White Scholarship

The White Coat Society

Marcella Dee Whitlock Scholarship

Jerry Ray Willis Scholarship

Damaris Wilson Scholarship

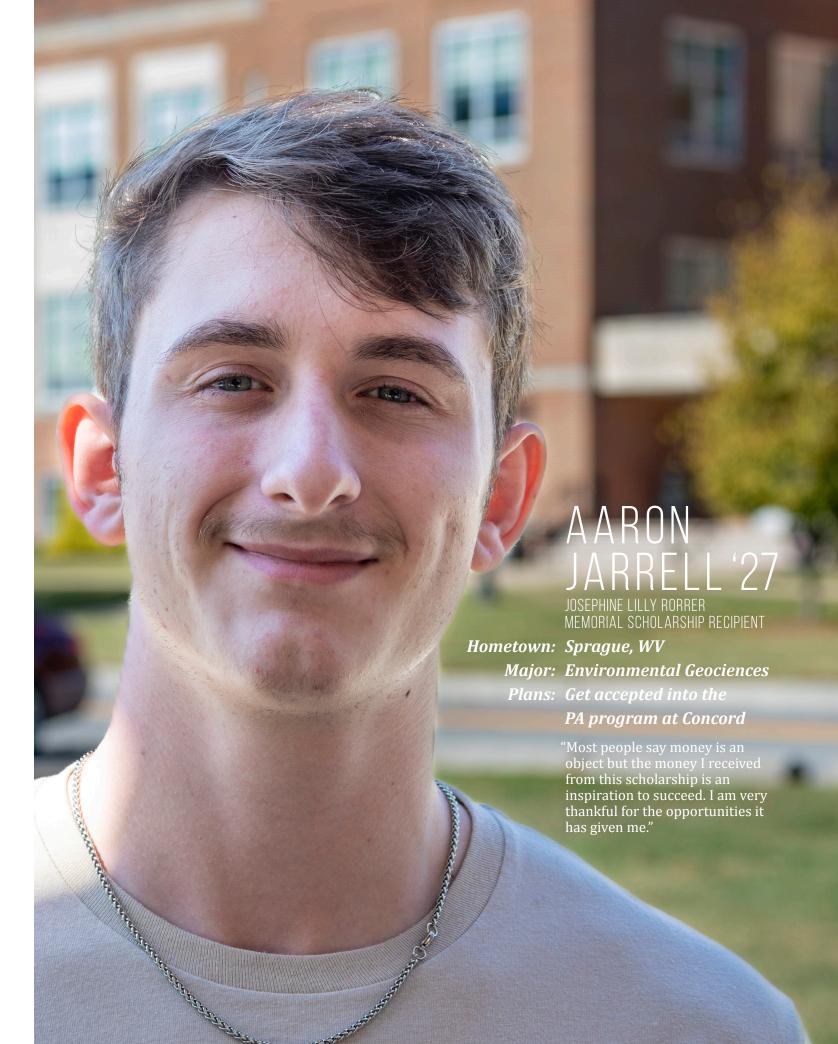
Woodrow Wilson High School Scholarship

Thomas G. Wilson Memorial Scholarship

Thomas G. Wilson Retention Scholarship

Adam Wooten Scholarship

Lorene Mae McKenzie Worrell '35 Education Scholarship



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### DONOR HONOR ROLL

# FOUNDATION SUPPORTERS

July 1, 2022 - June 30, 2023

The CU Foundation would like to recognize our generous donors for their support this past year. Thank you!

### \$100,000-\$499,999

Ben Ford

### \$10,000-\$99,999

Greg and Lorraine Allen

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Summersville Dairy Queen Tommy & Melanie Tabor Nathan and Sarah Turner Verizon Foundation

Donna T. Vickers James M. Walker Michael V. Webb

**Dennis Wood** 

Dr. Christopher H. Ziemnowicz

Unpaid pledges are not included in the giving amount for this list.

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# *July 1, 2022 - June 30, 2023*

A memorial gift is a wonderful way to honor a special person while at the same time helping others. Thoughtful memorial gifts made in a loved one's name are used to help Concord students achieve their academic goals. The Concord University Foundation would like to express our condolences to those that have lost loved ones this year. We are honored that so many of you have chosen to give back with these memorial donations.

Each featured name is a friend or loved one that has passed away. The names listed under each of those are the individuals that have made memorial contributions in their honor.

Thank you for allowing us to help keep their memory alive.

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The Mountain Lion Club, Inc. serves as a firm foundation for the continued development of Concord University athletics.

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