



# South Texas Money Management

## 2011 Outstanding Philanthropic Small Corporation

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*“I am speaking for the entire Winston community in recognizing STMM for their consistent support of our program, which helps children faced with learning differences in the greater San Antonio area, and their generous support and partnerships with other deserving nonprofit organizations.”*

*Paul R. Erwin, Director of Advancement*  
*[The Winston School, San Antonio](#)*

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When good business decisions intersect with the joy of giving, we call it the “sweet spot” of philanthropic giving. That “sweet spot” is at the core of the San Antonio Chapter of the Association of Fundraising Professionals’ National Philanthropy Day held earlier this week.

We want to congratulate South Texas Money Management, which was named Outstanding Philanthropic Small Business/Corporation for 2011. STMM is a company that continues to solidify its partnerships with area nonprofit organizations, as it reaches out to strengthen the San Antonio community.

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Founded in 2000, [South Texas Money Management](#) is an independent investment advisor, headquartered in San Antonio. With approximately \$1.7 billion in assets under management, 80% of STMM’s clients are individuals, with the remaining 20% being institutional clients, including public nonprofit organizations and private foundations.

At STMM, the culture of giving – both in time and in money – starts at the top, with CEO Jeanie Wyatt, CFA. She serves as a board member for several nonprofit organizations, most recently as Board President of the [San Antonio Opera](#).

Jeanie's belief in supporting the cultural arts in a city the size of San Antonio prompted STMM to support the Opera with a sizable financial donation, including funding the CFO staff position during a crucial, financially-challenging time. STMM's support of the San Antonio Opera made it possible for the community to enjoy two of the most prominent classical events in our city's history – the Andrea Bocelli concert in 2009 and the Placido Domingo concert in 2011. While STMM's support made the concerts possible, their outreach to the community during the Placido Domingo event extended to the military community. STMM donated 1,000 tickets to wounded warriors being treated at the [Center for the Intrepid](#), giving members of our armed forces a chance to enjoy the famed tenor's concert.

Nonprofit organizations have always been part of South Texas Money Management's profile. STMM has managed investments for nonprofit groups since the firm's inception. From day one, STMM implemented a "Giveback" program; the firm gives back 25% of its investment fee on a nonprofit account – up to \$5,000 on an annual basis – in the form of a donation. Two years ago, Jeanie challenged the firm to see how it could better serve its nonprofit clients, fueled by the belief that STMM should have a strategic focus in the nonprofit sector. Now, STMM has implemented a Quarterly Nonprofit Spotlight, which highlights one of its nonprofit clients to their existing client base. As part of its outreach, STMM makes presentations to nonprofit groups considering starting a foundation. STMM also hosts an annual nonprofit luncheon, which last year featured Kevin Salwen, author of [The Power of Half](#). This year, STMM's luncheon will feature Evan Smith, CEO and Founder of the [Texas Tribune](#), a nonpartisan, nonprofit media organization. Smith will share his unique perspective about defining success in the for-profit and nonprofit sectors. If you're interested in attending the December 7<sup>th</sup> luncheon, you can contact Mary Hime, Institutional Business Development Officer for STMM at [mhime@stmmltd.com](mailto:mhime@stmmltd.com).

Many employees at STMM follow the example Jeanie Wyatt has set, serving in a variety of leadership positions for nonprofit organizations in our community. In addition to serving in leadership roles for the [Children's Bereavement Center of South Texas](#), [Alpha Home](#) and [The Winston School](#), employees volunteer their time with the Girl Scouts, the Boy Scouts and Junior League, as well as many athletic leagues around San Antonio. They also participate in fundraising events throughout the year, benefiting causes such as breast cancer and Multiple Sclerosis.

South Texas Money Management says there are three reasons it participates in the nonprofit community.

First, it makes good business sense. STMM is a for-profit business offering money management services – a service many nonprofit organizations would benefit from. Reaching out to this community is smart networking.

Second, being involved in the community is good for employee morale - employees like working for a company they believe is making a difference in the community.

Third, giving back to the community where you live and work is the right thing to do. STMM believes there are many people in need, and many nonprofit groups that have found effective ways to meet those needs.

“STMM has provided a wide range of area nonprofits with direct assistance. We are proud to be listed among them,” wrote Paul R. Erwin, Director of Advancement for The Winston School in its letter to the AFP National Philanthropy Day Nominating Committee.