

Dear Clients & Friends,

We are pleased to announce that Calvin Edwards & Company (CEC) has joined with Blue Trust (formerly Ronald Blue Trust) to continue expanding our work by offering sound research and advice to donors.

I joined CEC after recognizing the gap that too often existed between the picture painted by leaders and fundraisers—and the reality of current work and its impact in the field. My experience leading the company over the past 18 months has served to solidify my belief that the answer to that problem is the same today as it was over 20 years ago when Calvin started the firm: independent, investment-grade information.

We are thrilled to continue the legacy that Calvin started in 2002—still seeking to bring about informed, thoughtful, and intentional giving by working with major donors and nonprofits. Though with fewer responsibilities (and more time for skiing), Calvin continues to faithfully contribute to our work in a number of crucial roles.

CEC has had a longstanding relationship with Blue Trust that has grown closer over the years. Blue Trust has referred clients to us, been an advocate for our work, and been our landlord in three different locations! In recent years, finding a strategic partner to run alongside us was one of Calvin's and my highest priorities.

Blue Trust is committed to helping its clients free up resources so they can be radically generous—we are honored to support those same clients to help them determine *where* the good of that giving can be maximized.

From a client perspective, we expect nothing to change as we merge with Blue Trust. We will continue to serve any donor that comes to us needing independent information from our giving strategy counsel. Our commitment to independent, robust, and reliable reports is our highest priority, and Blue Trust is equally committed to that work.

CEC has always been a strong, albeit small, consulting firm. With Blue Trust, we have access to more resources and a larger network that will serve to strengthen and enlarge our impact. The future is bright!

Thank you for believing in us and supporting our vision.

Nathan Staub
Managing Partner

Calvin W. Edwards
Founder
17840431-01-24