



2023 ANNUAL REPORT



THANK YOU To Our Esteemed Donors



Your contributions are the sustaining force of our community-changing work, directly translating into much-needed support for the people and communities we serve.

Our Mission

The Commonwealth Cares® is a charitable organization established by Commonwealth Financial Network to maximize the impact of our many and varied efforts to give back to the communities in which we work, live, and visit.

Who We Serve

We are committed to supporting a wide range of philanthropic efforts wherever and whenever our help is needed most.

In Our Community

Commonwealth employees in Waltham, Massachusetts, and San Diego, California, come together to volunteer their time and energy to help those in their immediate communities.

Where Our Advisors Call Home

Our advisors embody the spirit of giving back in their own hometowns. Whether they're championing an event or contributing to a need, we offer financial support to the causes that are nearest and dearest to them.

On the Road

As a thanks to the communities that host our educational conferences, our advisors, their families, vendors, and staff join forces to support and assist local and grassroots nonprofit organizations.

Board of Directors and Staff

Wayne Bloom, *Chairman*

Jessica Fougere, *Member at Large*

Joni Youngwirth, *Executive Director*

Amy Pagano, *Member at Large*

Heather Zack, *Treasurer*

Katie Kent, *Executive Assistant*



A Message from Our Executive Director



Through grants each year, Commonwealth Cares supports a wide range of philanthropic efforts wherever and whenever our help is needed most—and we couldn't do any of it without the extreme generosity of our donors.

Our commitment to financial transparency ensures that **100 percent of every dollar** you donate is directly channeled to those in need, with Commonwealth Financial Network® covering all of the fund's overhead.

This model allows us to respond to the ever-changing global landscape and focus on the causes our community cares about most. For example, during Commonwealth's 2023 National Conference, our audience was moved by Father Greg Boyle's keynote address and heartbroken as news emerged of the war in the Middle East. In response, Commonwealth Cares created a matching grant initiative, which raised nearly \$150,000 in support of gang member rehabilitation stateside and Red Cross relief efforts overseas.

As a public organization, the IRS expects approximately one-third of our funding to come from outside of Commonwealth. **In other words, our existence relies on the support of individual donations.** We conduct due diligence to ensure all grants go to other 501(c)(3)s in good standing and prohibit grants to political or non-secular organizations or education capital funding.

Many of our grants are born from the hearts and minds of Commonwealth's employees and advisors and long-standing partnerships with organizations like Read to a Child, Make-A-Wish, and local food banks. We support industry partners who share our passion for philanthropy, such as The Foundation for Financial Planning and Invest in Others.

Last year, I was excited to participate in the first annual Commonwealth 5K Fun Run/Walk to benefit the Commonwealth Cares Fund. I loved getting out and moving with the nearly 300 of you who showed up on a chilly Friday morning in Colorado.

And that's just part of what makes Commonwealth Cares so special: our ability to remain nimble and focus our efforts on the causes most important to you, our donors. We are so grateful to all those who make our work possible, and we can't wait to see what we continue to accomplish...together.

Joni Youngwirth, Executive Director

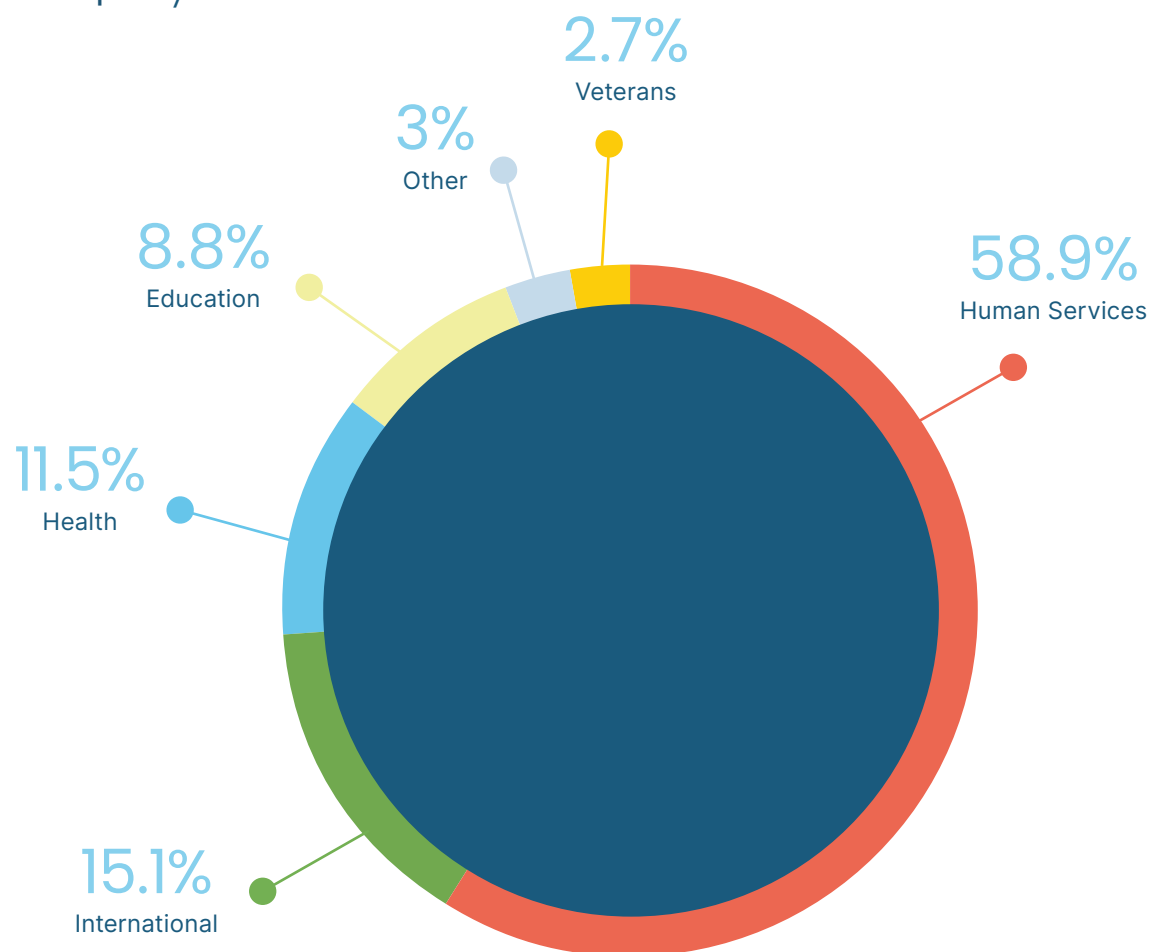


Year in Summary

\$391,500
in grants disbursed

346 total grants sent
to 153 organizations

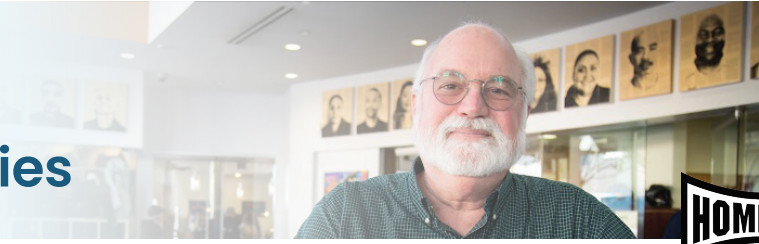
\$127,700 received from
third-party donors



Did you know? Commonwealth employees and advisors may request an annual grant of \$250 for an organization in which they actively participate.



Featured Grant Homeboy Industries



During Commonwealth’s National Conference, Father Greg Boyle, founder of Homeboy Industries, delivered a moving keynote address on his unwavering faith in the human spirit. Father Greg served as pastor of Dolores Mission Church from 1986 to 1992. At the time, Dolores Mission was the poorest Catholic parish in Los Angeles and had the highest concentration of gang activity in the city.

Father Greg sought to find the good in every person, regardless of circumstance. He befriended members of his community and worked tirelessly to uncover new paths to redemption. Today, Homeboy Industries is the largest gang intervention, rehabilitation, and re-entry program in the world, providing critical service to thousands of individuals who walk through its door every year seeking a better life.

In response to the Commonwealth community investment in Homeboy Industries and Father Greg, in the weeks following the conference, Commonwealth Cares® set up a matching grant fundraiser that ultimately distributed \$100,000 in support of the organization’s radical, lifesaving work.

Thank you to all who donated!

Featured Grant Native Seeds/SEARCH



For more than four decades, Native Seeds/SEARCH has stewarded the seeds of the desert Southwest and Mexico. Conserving more than 1,800 regional seed varieties—representing the agricultural heritage of more than 50 Indigenous communities—their mission is preserving seeds for the future and their distribution today, prioritizing this unique region.

During Commonwealth’s Business Experience conference in Tucson, volunteers contributed to the organization’s rainwater harvesting efforts by digging a spiral-shaped basin. The water collected in the basin feeds newly planted fruit trees and surrounding gardens, allowing the desert native plants to grow to maturity much faster.

Thank you to all the hardworking volunteers!



Grant Recipients

Since its establishment in 2010, Commonwealth Cares has given back to nearly 400 organizations worldwide. Whether providing supplies and money after a disaster or rolling up our sleeves to offer some much-needed help, we're always looking for ways to contribute to those in need.

GRANTS DISBURSED IN 2023

| | | |
|--|---|---|
| 29 Acres | Expect Miracles Foundation | Nicholas R Collins Superhero Foundation |
| A Better Childhood | Experience Camps | Nickel from Nicole |
| A Precious Child | Fairway to Heaven | Operation Game On |
| ALS Association | Family Promise Metrowest | Oxfam America |
| Alzheimer's Association | Feeding America | Pancreatic Cancer Action Network |
| American Cancer Society | Feeding Southwest Virginia | Pan-Florida Challenge |
| American Public Education Foundation | First Witness Child Advocacy Center | Pan-Mass Challenge |
| American Red Cross | Fitchburg Friends of Felines | Penn State Health |
| American Red Cross of Massachusetts | Foundation for Easton Schools | Portland Rossini Club |
| American Red Cross of Southern California | Foundation for Financial Planning | Ramona Pony League |
| Animal Pad | Framingham Boys & Girls Football & Cheerleading | RD26 Foundation |
| Ararat Association | Friends of Amesbury Council on Aging | REACH Beyond Domestic Violence |
| Arc Allegany-Steuben | Giving the Glam | Read to a Child |
| ASPCA | Global Empowerment Mission | Red Sox Foundation |
| Autism Speaks | Greater Kansas City Community Foundation | Rescue a Golden of Arizona |
| Bentley University | greeNest | Ronald McDonald House Charities |
| Big Brothers Big Sisters of America | Habitat for Humanity | Rosie's Place |
| Big Brothers Big Sisters of Eastern MA | Homeboy Industries | Rotary Club of West Bend Foundation |
| Bikes Fight Cancer | Home for Little Wanderers | Run Geek Run |
| Bikes Not Bombs | Hope for Ukraine | Saheli |
| Birthday Wishes | Hope Lives Here | San Diego Fireman's Relief Association |
| Boston Children's Hospital | International OCD Foundation | San Diego LGBT Community Center |
| Boston Medical Center | Joe Andruzzi Foundation | ScotDance USA |
| Bottom Line | Jog Your Memory 5K | Senior Coastsiders |
| Boys & Girls Clubs of America | Jonathan's Place | Sewa USA |
| Boys & Girls Club of Greater San Diego | Junior League of Riverside | ShelterBox USA |
| Boys & Girls Club Pikes Peak Region | Keeping Our Promise | SLO Noor Foundation |
| Boys & Girls Club of Waltham | Keeps | Southern Oregon University Foundation |
| Bubbles Dog Rescue | Kennedy Community Health Center | Spaulding Rehabilitation Hospital |
| Cape Kid Meals | kidSTREAM | Special Olympics |
| Casa Project | Korean Performing Arts Institute of Chicago | spreadJOY |
| Central New York Community Foundation | Lancaster Public Library | St. Jude Children's Research Hospital |
| Chapman Partnership | Legacies of War | Stonington Little League |
| Children's Hospital of Buffalo Foundation | Little Bitty Animal Sanctuary | Symphoria (Musical Association of NY) |
| Children's Miracle Network Hospital | Lori's Truth | Think Dignity |
| Chinese American Association of Lexington | MA Chiefs of Police Association Foundation | Tillerman Foundation |
| Civil Air Patrol | Maine Veterans Project | Together Invested |
| Community Servings | Make-A-Wish Foundation of America | Traveling Turkeys |
| Connecticut Children's Medical Center Foundation | Make-A-Wish Foundation of San Diego | TrueNorth Wellness Services |
| County of Pulaski FBO Draper Park | Make-A-Wish Massachusetts & Rhode Island | UMass Chan Medical School |
| Curebound: Padres Pedal the Cause | Mal's Pals Foundation | Union County Foundation |
| Dana-Farber Cancer Institute | Massachusetts Audubon Society | Vista Soccer Club |
| Danbury Grassroots Academy | Maui Humane Society | Waltham House |
| Devereux Foundation | Military Friends Foundation | Westborough Appalachia Service Project |
| DiMatteo Family Charitable Foundation | More Music Foundation | Wily Network |
| Doctors Without Borders USA | MSPCA | Wounded Warrior Project |
| Doug Flutie Jr. Foundation for Autism | National Federation of the Blind Indiana | YWCA Boston |
| Dreamfar High School Marathon | National Multiple Sclerosis Society | YMCA Central Maryland |
| Earth Day Network Canopy Project | National Ovarian Cancer Coalition | YMCA Greater Somerset County |
| Ekam USA | Native Seeds/SEARCH | YMCA Waltham |
| Emmanuel Cancer Foundation | New England Hemophilia Association | |
| Environmental Defense Fund | New Hampshire Food Bank | |



You're Simply the Best!

Thank you for your support and belief in doing good. We simply couldn't do what we do without amazing, generous people like you.

DONATIONS RECEIVED IN 2023

| | | |
|-------------------------|--------------------------------|------------------------|
| Alexandra Armstrong | Coley O'Donnell | Jaime Rogers |
| Alfa Radford | Colin Kramer | James Cox |
| Allison Schwartz | Commonwealth Financial Network | James Forsyth |
| Amazon Smile | Connor Mason | James Harvey |
| Amber Cao | Courtney Gauthier | James Leahey |
| Ames Financial Services | Craig Skeels | Jamie King |
| Amy Frix | Craig Stearns | Jaime Whiteman |
| Amy Kitson | Curtis Matlin | Jane Braun |
| Andrew Daniels | Dana Allen | Jason Babiarz |
| Andrew Wheeler | Dana Pollard | Jason Rein |
| Angello Carlin | Danette Lowe | Jason Wheeler |
| Ann Marie Milinazzo | Daniel Ball | Jeffrey Crisp |
| Ashleigh Joint | Daniel Brown | Jeffrey Segal |
| Ashley Gusha | Daniel Cook | Jennifer Augustine |
| Avigail Curry | Daniel Jeffery | Jennifer Hodson |
| Barry Shapiro | Daniel Porter | Jennifer Patten |
| Beata Dragovics | Danielle Holmes | Jennifer Tivnan |
| Becca Hajjar | David Berman | Jennifer Williams |
| Berkley Arrants | David Floyd | Jesse Bell |
| Beth Castanini | David Pease | Jessica DiMatteo |
| Brandon Cox | Debbie Osifat | Jessica Dunham |
| Brendon Maloy | Dennis Clavin | Jill Hansen |
| Brian Coneeny | Dennis Crow | JoanAnn Natola |
| Brian Connolly | Diane Dodson | Jodi Manthei |
| Brian Ephraim | Dianne Webb | Jody Lease |
| Brian Ganger | Dillon Gonzalez | Joel Ouellette |
| Brian Massengale | Dina Sonenshein | Joelle Spear |
| Brian Patton | Don Kaplan | John DiMatteo |
| Brooke Leahy | Donald Albacker | John Fitzgerald |
| Bruce Hosler | Douglas Bambeck | John Gunning |
| Bruce Moskowitz | Ed Stiles | John Hagberg |
| Bryan Crabtree | Elizabeth Busby | John Ledesma |
| Bryan Pratt | Elizabeth Sullivan | John Olson |
| Bryan Saylor | Ellen Rosenberg | John Patrick Madigan |
| Caitlin Trites | Eric Anton | John Wood |
| Cameron Freeman | Eric Peterson | John Zachary |
| Cap Clegg | Ethan Young | Joleen Yelton |
| Catherine Hyder | Evan Cole | Jon Pinnock |
| Charlotte Jay | Foundation Financial Advisors | Jonathan Munro |
| Chris Fasciano | Frank Gambardella | Jonathan Neipris |
| Chris Morse | Gabe Lapito | Joni Youngwirth |
| Chris Powers | Gayle Starr | Joseph Matza |
| Christa Canavan | Geoff Harkness | Joseph Medeiros |
| Christian Miller | Gerardo Gonzalez | Joseph Shaddock |
| Christine Byrne | Ginger Kessel | Josh Ervasti |
| Christine McLean | Hayley Deavel | Josh Kaplan |
| Christopher Baker | Heather Nutter | Josh Murray |
| Christopher Collins | Howard Kramer | Joshua Paul |
| Christopher DeRuyver | Howie Pentony | Joshua Wilcoxson |
| Christopher Jones | Jack Alissi | Juliana Pasquarosa |
| Christopher Wells | Jack Heintzelman | Justin Jones |
| Clare Graham | Jae Ha | Karen & Stan Steinberg |



DONATIONS RECEIVED IN 2023 (continued)

Karen Barsanti
Kate Pickert
Kate Zien
Katie Brady
Katie Reilly
Kelly Ronimus
Ken Koppitz
Kerri Kimball
Kevin Best
Kevin Handford
Kevin Moore
Kim DiMatteo
Kristen Hemmings
Kristina Surkova
Kurt Whitesell
Kyle Tatro
Landon Tymochko
Larry Witzel
Laura Cronin
Laura Peeke
Lauren Marchese
Laurie Shiavone
Leisl Langevin
Lindsay Hill
Lisa Cremonini
Louis Orazio
Louise Sharp
M. Katherine Liola
Marc Lennon
Marianna Goldenberg
Mark Gallagher
Mark Singer
Mary Cousineau
Maryann Lazzaro
Mathew Powers
Matt Howell
Matt Stys
Matthew Wilson
Maureen Maguire
Megan Benison
Megan Berkowitz
Megan Collins
Megan Rinaudo
Melissa Hrusovsky
Michael Bakker
Michael Buxbaum
Michael Canfield
Michael Cantor
Michael Hodge
Michael Sillum
Michael Valudes
Michael Weston
Michelle Cortes-Harkins
Michelle Kelley
Michelle Lasko
Michelle Poston
Mike Muffoletto
Mitchel Sherman
Mitchell Glicksman
MOR Wealth Management
Nan Bailey
Nathan Brobst
Navarro Family Charitable Fund
Ned Steiger
Network for Good
Nicholas Christie
Nicholas Mongeon
Nick Jackson
Nicole Moskowitz
Noel Barnes
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Patrick Beale
Patrick Dempsey
Patrick Fuller
Paul Orazio
Peggy Ho
Peter Daniels
Peter Gawreluk
Pioneer Valley Financial Group
Quinn Mickelson
R. Lynette Laughter
Rachel Wood
Randy Morris
Rebecca Kauffman
Rebecca Linhart
Richard Colarossi
Richard Hunter
Richard Levy
Rick Meinhardt
Robert Hoey
Robert Huether
Robert Jones
Robert LoPorto
Robert Swanke
Rod Drysdale
Ron Berkowitz
Ron Mastrangelo
Rondelle Long
Ross Haycock
Roy Janse
Ruth Matt
Ryan Dignum
Ryan McCall
Sally McCray
Sandra Russ
Sanjay Tomar
Sarah Howes
Sarah Kaplan
Scot Shyman
Scott Muma
Scott Robinson
Sean & Michelle Buckley
Seth Goeken
Shabri Moore
Shana Bielich
Shaun Walton
Shawn Derrick
Sheila Braun
Sheila Stehlin
Shelby Trinkino
Stacey Hyde
Stella Reiger
Stephanie Cappiello
Stephanie Pearson
Stephany Abrams
Stephen Kastrul
Steve Blandino
Steve Richardson
Susan Torbin
Suzanne Soistman
Tari Trowbridge
Taylor Lloyd
Terrence Pellitteri
Terry Brown
Thomas Bartholomew
Thomas Janicki
Tim Weller
Timothy Shean
Todd Cottingham
Todd Ehrenberg
Travis Norgren
Tressa Wood
Tyler Jones
Tyler Price
Tyrone Financial Services
Valerie Tesaro
Veronica Dende
Warren Cohen
Weiss, Hale & Zahansky Strategic
Wealth Advisors
Whitney Johnson
William Hatcher
William Lewis
Yvette Haase



Leading the Way

Thank you to the many Commonwealth employees and teams that volunteer time and resources to organizing giving back initiatives throughout the year!

Giving Back Captains

- Allison Vassallo
- Amber Calkins
- ARISE ERG
- Amrita Gill
- Amy Pagano
- Bill McDermott
- Charlotte Allen
- Chris Allen
- Chris Mariere
- Christina McCalla
- Community Team
- Compliance Team
- Deb Wappler
- Gavin Thill
- Hamsa Shan-Nath
- Jessica Fougere
- Jessica Towns
- Jon Munro
- Jonathan Bryda
- Krista Weaver
- Matt Hurley
- McKenzie Clapp
- Meghan Powell
- PRIDE ERG
- Shannon Finneran
- Stephanie Pearson
- Tracey Lydon
- User Experience Team
- Veronica Montersosso
- Whitney Johnson





Run Like the Wind

Almost 300 participants joined us for the inaugural National Conference 5K Fun Run/Walk to benefit the Commonwealth Cares Fund. Thanks to everyone who laced up and showed up in support of the communities where we live, work, and visit.

2023 5K PARTICIPANTS

Adam Kunkel
 Alex Koury
 Alex Di Martini
 Alissa Martell
 Amy Kitson
 Anais Callejon
 Anastasia Curtis
 Andrea Roesel
 Andrew Cloose
 Andrew Daniels
 Angelique Ayala
 Anna Ledesma
 Anne Trenholm
 Armand Overstreet
 Ashley Goeken
 Ashley Ott
 Austin Hebert
 Avi Curry
 Barry Butlien
 Beata Dragovics
 Becky Robey
 Beth Humphreys
 Beth Westburg
 Bill Gaines
 Bill Lewis
 Bill Stewart
 Billy Gaines Jr.
 Bob LoPorto
 Bob Adler
 Brendan Maloy
 Brenden Olsen
 Brent Connelly
 Brian Konz
 Brian Regier
 Brian Peterson
 Brian Ganger
 Brian Chernoff
 Brian Luedke
 Brittany Fiore
 Brittany Perske
 Brittany Feller
 Brook Deaver
 Brooke Leahy
 Bryan Pratt
 Bryan Saylor
 Carrie Dick
 Casey Bettencourt
 Catherine Hyder
 Catherine Logothetis
 Chancellor Harkins
 Charlotte Jay
 Chris Hovey

Chris Wells
 Chris Busby
 Chris Baker
 Chris Fasciano
 Chrissy Ervasti
 Christian Stout
 Christine McLean
 Christine Byrne
 Christine Drysdale
 Christy Raines
 Christy Dempsey
 Clare Graham
 Clay Chapman
 Coley O'Donnell
 Connor Mason
 Cory Melchior
 Courtney Gauthier
 Craig Stearns
 Crystal Richardson
 Crystal Lee
 Dan Ball
 Dan Jeffery
 Dan Brown
 Dana Allen
 Daniel Johnson
 Danielle Holmes
 David Floyd
 David Pease
 David Hill
 Deanna Leombruno
 DeCarla Reed
 Dennis Crow
 Diana Colmenares
 Diane Greer
 Dianne Webb
 Dina Sonenshein
 Donald Pogan
 Doug DiDominica
 Duncan Wilson
 Dustin Sauter
 Dylan Justice
 Ed Sokolowski
 Elaine Lin
 Elizabeth Campbell
 Emily Promise
 Eric Riedesel
 Eric Fishel
 Eric Watson
 Eric Rawe
 Eric Martin
 Erin Corso
 Ethan Daniels

Frank Gambardella
 Garrett Weeks
 Gary Ruchin
 Geoff Harkness
 Glenn Nelson
 Greg Merrill
 Heidi Oakley
 Holly Wanegar
 Howard Kramer
 Jack Heintzelman
 Jack Evans
 Jackie Weibler
 Jae Ha
 Jake Ruggles
 James Schneider
 James C. Taylor
 Jamie Rodgers
 Jamie Wilson
 Janae Sowards
 Jason Babiartz
 Jay Barish
 Jeff Boyer
 Jeffrey Crisp
 Jennifer Tivnan
 Jennifer Moran
 Jess Grillo
 Jess Blood
 Jesse Bell
 Jesse Cornell
 Jessica DiMatteo
 Jill Hansen
 JoanAnn Natola
 Jodi Manthei
 Joe Lowry
 Joe Medeiros
 Joel Ouellette
 Joelle Spear
 John Olson
 John Fitzgerald
 John Schannep
 John Zachary
 John Dimatteo
 Joleen Yelton
 Jonathan Farrell
 Jonathan Good
 Joni Youngwirth
 Jordan Kuehner
 Josh Kaplan
 Josh Murray
 Josh Hill
 Josh Ervasti
 Josh Farrell



2023 5K PARTICIPANTS (Continued)

Joshua Wilcoxson
 Julia Lindberg
 Julie Stout
 Justin Jones
 Kaira Haycock
 Karen Barsanti
 Karen Roth
 Karysa Swackenberg
 Katherine Pickert
 Kay Pfleghardt
 Kelly Ronimus
 Kelly Stadtherr
 Ken Muskat
 Ken Brown
 Kenton Shirk
 Kerri Kimball
 Kerry Hensley
 Kevin Dick
 Kevin Pentz
 Kevyn Sopinski
 Kim Jestrab
 Kim Kastrul
 Kim DiMatteo
 Kristin DiDominica
 Kristina Surkova
 Kritameth Pongcheewin
 Krystal Wyss
 Kyle Manthei
 Landon Tymochko
 Larry Albert
 Laura Peeke
 Lauren Marchese
 Laurence Hale
 Laurie Schiavone
 Lea Vavoules
 Lisa Cremonini
 Lisa Dinh
 Liz Cooper
 Louis Orazio
 Maggie Guiney
 Manny Dela Cerna
 Marcy Kiely
 Marja Sweet
 Marty Gaughan
 Mary Cousineau
 Matt Morgan
 Matthew Lewis
 Matthew Howell
 Matthew Deitch
 Meena Cheng
 Megan Berkowitz
 Megan Rinaudo

Megan Benison
 Megan Haley
 Michael Canfield
 Michael Trenholm
 Michael Kolb
 Michael Cantor
 Michael Primiani
 Michael Elser
 Michelle Poston
 Michelle Kelley
 Michelle Lasko
 Michelle Cortes-Harkins
 Mike Valudes
 Mike Hebert
 Mike Bakker
 Mike Baum
 Milos Vrzic
 Mitch Strobel
 Mitchel Sherman
 Mukund Ravipaty
 Nan Bailey
 Nancy Hayes
 Natalie Hodak
 Nathan Wegman
 Neal Martin
 Ned Steiger
 Nicholas Ovshak
 Nicholas Mydlo
 Nick Krey
 Nick Jackson
 Nicole Hurley
 Nicole Potcner
 Noel Barnes
 Oscar Lopez
 Pam Kaye
 Patrick Beale
 Patrick Jennings
 Patrick Dempsey
 Paul Orazio
 Peggy Ho
 Phillip Mazzola
 Rachel Wood
 Randy Morris
 Rob Hoey
 Rob Stenzel
 Ron Berkowitz
 Rosa Bibian
 Ross Haycock
 Ryan Fanizza
 Ryan McCall
 Ryan Dignum
 Sam Heveroh

Samantha Hubbard
 Sarah Walter
 Scott Robinson
 Scott Muma
 Scott Peck
 Shabri Moore
 Shane Keith
 Sharon Jansma
 Shaun Walton
 Sheila Braun
 Shelly Beyers
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 Stephany Principe
 Steve Kastrul
 Stuart Honenberger
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 Susan Kendall
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 Suzanne Deaver
 Tari Trowbridge
 Taylor Yelton
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 Tracy Kindall
 Tressa Wood
 Ty Zwick
 Tyler Buitenwerf
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Contact Us

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www.commcares.org

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