

Impact Report



Roger J. Trinchero
FAMILY FOUNDATION

A Message from the Chairman

At the Roger J. Trinchero Family Foundation, our mission is clear: **to provide support for children's education, physical education, sports, and health initiatives.** It is with great pride that I present this year's Impact Report, highlighting the profound difference we have made in the lives of individuals and communities.

Built on the values of generosity, integrity, and a deep-rooted commitment to giving back, our foundation continues to uphold these principles as we expand our efforts. Over the past year, we have strengthened our support for education, healthcare, and community development, ensuring that resources reach those who need them most. From funding scholarships that empower the next generation to investing in initiatives that promote sustainability and well-being, we remain steadfast in creating lasting, positive change.

This impact would not be possible without the dedication of our partners, supporters, and volunteers, who share in our vision of a stronger, more compassionate world. Your contributions fuel our mission, and together, we are building a legacy of generosity that will endure for generations to come.

Thank you for being a part of this journey.

Roger J. Trinchero
Chairman, Roger J. Trinchero Family Foundation

Impact Snapshot

\$26.6M

Total Funds Contributed

\$6M

Total Grants Awarded

14

Total Grant Recipients

Through the Years: Progress, Purpose, and Possibilities

The Roger J. Trinchero Family Foundation's Enduring Commitment to Napa Valley

Philanthropy is not just generosity; it's a legacy of care, responsibility, and vision. For the Trinchero family, giving back has always been personal. Roger Trinchero, alongside his siblings Bob and Vera, spent decades quietly supporting causes in Napa Valley, the community where they grew up and where their winemaking legacy began.

In 2017, recognizing the need for a structured, enduring approach, Roger established the Roger J. Trinchero Family Foundation. Its mission was clear: to ensure the family's tradition of local giving continued for generations. Initially focused on children's education, physical activity, sports, and health, the Foundation supported programs that nurtured young minds and healthy futures.

The first beneficiaries—St. Helena Cooperative Nursery School, St. Helena Preschool for All, and Carpy Gang—embodied this vision by providing early childhood education and enrichment in Napa Valley, where the family's winemaking roots run deep.

Expanding Purpose: A Response to Growing Needs

In 2020, the COVID-19 pandemic exposed vulnerabilities across communities, including Napa Valley. One challenge stood out: food insecurity. Understanding that children cannot thrive if hungry, the Foundation quickly partnered with the Community Action Napa Valley (CANV) Food Bank, ensuring vulnerable families had consistent access to nutritious food. CANV remains a core partner today.

The Foundation also recognized that supporting a child's success requires more than education. It expanded its mission to address mental health, unstable home environments, and lack of resources. New partnerships included:

- Ten Thousand Degrees of Napa Valley – Supporting underserved students' higher education access
- Howell Mountain Elementary School – Strengthening local school programs
- Voices Napa – On the Move – Empowering foster youth
- Mentis – Providing mental health support
- Palisades High School – Enhancing educational opportunities
- NEWS (Nurturing Empowerment Worth and Safety) – Supporting children affected by domestic violence

These efforts transformed the Foundation into a force for systemic change, addressing root causes of hardship rather than just symptoms.

Measuring Impact: From Grants to Long-Term Change

Between 2018 and 2024, the Foundation distributed approximately \$4.7 million in grants. However, the true impact is measured in lives changed, not dollars. The Foundation ensures each dollar makes a lasting difference by carefully vetting beneficiaries to align with its values.

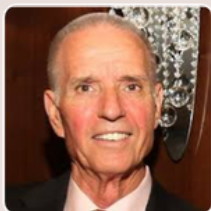
The grant process has two phases:

1. Initial One-Year Grant: Organizations receive funding for one year, with accountability for their use of funds and impact.
2. Multi-Year Support: Successful organizations may receive three-to-five-year grants, providing stability and room for growth. This model fosters deeper relationships and long-term change.

A Legacy of Purpose and Possibility

Through its evolution, the Roger J. Trinchero Family Foundation remains steadfast in its mission to uplift children and families in Napa Valley. As community needs change, the Foundation continues to adapt, driven by its commitment to meaningful and lasting impact.

Leadership & Governance



Our Founder

Roger J. Trinchero, Chairman of the Board of Trinchero Family Estates, established the Foundation in April 2017 with a multi-million-dollar contribution from his personal estate. Over the past seven years, he has continued to invest in the Foundation, ensuring its growth

and expanding its impact. With a steadfast commitment to making a meaningful difference, Roger is dedicated to supporting the Foundation's beneficiaries in real time—the time is now. Ultimately, his entire remaining estate will be entrusted to the Foundation, securing a lasting legacy of generosity and transformation.

Executive Team



Mario Trinchero
Director



Gino Trinchero
Director



Paul Krsek
Director



Mark Smithers
CFO



Natacha Kolb
Secretary

Advisors

Meghan Krsek, CFO of 5T Wealth

Christopher Roth, CIO of 5T Wealth

Marissa Nuqui, Accountant at 5T Wealth

Jennifer Trinchero, B.S., R.N.

Katie Bowles, Deloitte Tax Partner

Special Mention

Burr Pilger Mayer (BPM), Auditor

Charitable Trust Administrator,
IRS Compliance, under contract through
2026

Robert "Rob" Goldman
Former Director and Family Attorney

A Partnership Rooted in Trust and Shared Values

The Roger J. Trincherro Family Foundation and 5T Wealth, LLC have forged a lasting partnership founded on trust, transparency, and shared values. Their collaboration began in 1991 when Roger J. Trincherro and Paul Krsek met at the Winter Ball fundraising event for the Boys & Girls Club of St. Helena, establishing a connection that has flourished in both philanthropy and wealth management.

5T Wealth, LLC is a boutique family office services and wealth management firm recognized for its bespoke financial solutions. Its approach is anchored in five core pillars—time, temperament, talent, technology, and team.

Family Office Services: A Competitive Advantage

At the heart of 5T's success lies its Family Office Services, led by Co-Founder and Chief Financial Officer Meghan Krsek, whose strategic vision ensures seamless financial stewardship for ultra-high-net-worth families. Supported by a team of three highly skilled professionals, the Family Office team excels in navigating complex financial structures. Whether managing a single-family office or a multi-family office, the team delivers tailored solutions designed to meet the dynamic needs of the most sophisticated families.

As the driving force behind the firm, the team oversees:

- Expertise in GAAP accounting, with a focus on 501(c)(3) organizations.
- Oversight of audited financial statements, accounting, bill pay, grant disbursement, and beneficiary tracking.
- Meticulous management of intricate financial structures, ensuring wealth preservation and strategic positioning for long-term growth and impact.

Beyond Wealth Management, the Family Office Services Provide:

- Estate and tax planning
- Philanthropic advisory
- Risk management
- Concierge-level lifestyle services

A Trusted Steward for Generational Wealth & Philanthropy

This expertise positions 5T Wealth as the ideal partner to manage the Roger J. Trincherro Family Foundation's assets, philanthropic commitments, and beneficiary relationships. By combining financial acumen with a deep understanding of family legacy and charitable impact, 5T Wealth ensures that the foundation's mission is carried out with integrity, efficiency, and long-term vision.

Executive Profiles



Paul Krsek
Co-Founder and CEO

✉ Paul@5TWealth.com

Paul Krsek drives the firm's strategic growth and operations. With a career spanning leadership roles in banking, finance, and philanthropy, he is dedicated to delivering innovative, tailored wealth management solutions.

Before 5T Wealth, Paul co-founded and served as a director for Napa Community Bank and the Bank of San Francisco. He also led Angeles Securities Corporation in Los Angeles as President and CEO, overseeing more than \$4 billion in assets under management.

Beyond his professional achievements, Paul is a committed philanthropist and longtime Rotarian, actively supporting community initiatives for over 30 years. He has also served as a director of The Roger J. Trincherro Family Foundation.

Paul holds a B.A. in Sociology from Shippensburg University of Pennsylvania and studied Business Management at UCLA's Anderson School of Management.



Christopher Roth, CFA®
Chief Investment Officer

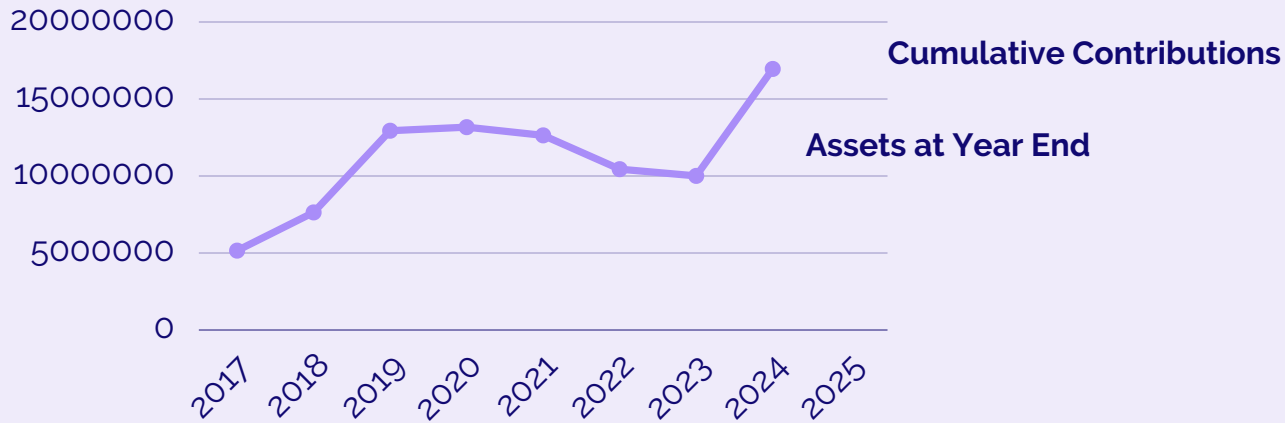
✉ Chris@5TWealth.com

Christopher Roth oversees investment and financial planning at 5T Wealth, LLC, bringing extensive experience in portfolio management, asset allocation, and risk assessment.

Before joining 5T Wealth, Chris was a Founding Partner and Senior Advisor at Delegate Advisors, an independent RIA managing over \$1 billion in assets. He also served as a Manager at Brownson, Rehms & Foxworth (BRF), a respected financial advisory firm in Menlo Park, California. His early career includes roles at Accenture and JP Morgan Asset Management.

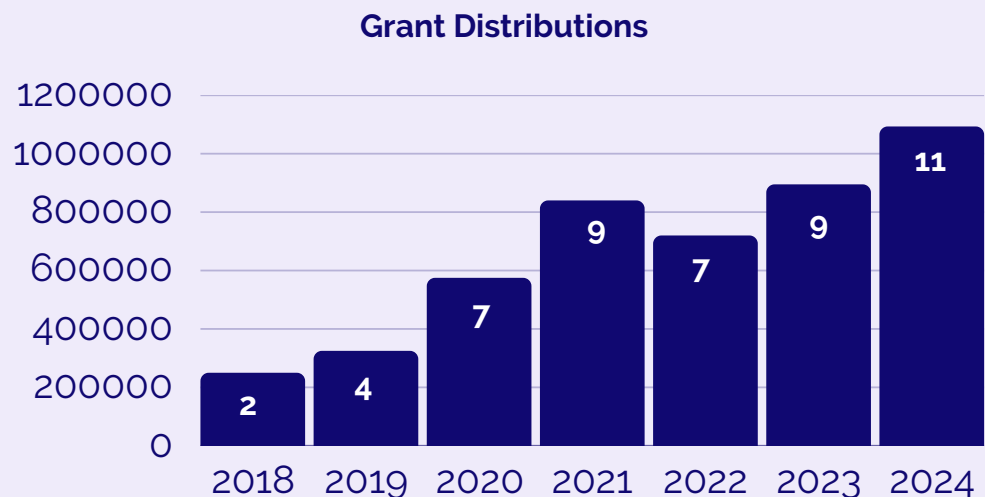
Chris graduated cum laude from Georgetown University with a B.A. in Accounting and Finance and is a Chartered Financial Analyst (CFA®) charterholder.

Key Financials



Growth Metrics of the Foundation (2017-2025):

- **Initial Capital:** \$4,951,918 (2017)
- **Current Capital:** \$26,627,212 (2025)
- **Cumulative Contributions:** \$26,627,212 (2017-2025)
- **Cumulative Grant Distributions:** \$4,598,207 (2017- 2024)



Grant Recipients



St. Helena Cooperative Nursery School

Since 1966, the nursery school has been a pillar of early childhood education in Napa Valley, fostering a supportive and enriching environment for families. More than just preparing children for kindergarten, the Co-op instills a love of learning, a sense of community, and the foundational skills needed for a lifetime of growth.

A grateful parent shares:

"Many parents today worry about whether a preschool will adequately prepare their child for kindergarten. For me, the Co-op has done so much more—it has prepared my children for life. It provides a nurturing space where both children and families build meaningful, lasting connections. I can't imagine a better place for my kids to have spent their early years. The St. Helena Co-op and its dedicated teachers will always hold a special place in our hearts."

Through decades of commitment to early childhood education, the Co-op continues to shape young minds and strengthen family bonds, ensuring its impact endures for generations to come.



St. Helena Preschool For All (SHPFA)

SHPFA is committed to ensuring that every child in St. Helena has access to quality early childhood education, regardless of financial circumstances. By providing scholarships to low-income families, SHPFA makes preschool accessible to children who might not otherwise have the opportunity to attend. Through partnerships with five local preschools, we help lay the foundation for lifelong learning, giving every child the chance to thrive and succeed.



Community Resources for Children (CRC)

CRC helps children thrive and learn by providing resources to the adults who care for them. As a trusted hub for early learning and care, CRC fosters safe, nurturing environments through culturally responsive services—including child care referrals, financial assistance for child care, school readiness programs, caregiver support groups, and professional development for child care providers. By offering these supports, we ensure that parents, caregivers, and providers are empowered to succeed in their roles and nurture the healthy growth and development of the children in their care.



ParentsCAN

The organization is committed to meeting the needs of children with a wide range of disabilities and special needs. Their programs are designed to meet the diverse needs of family childcare home providers, childcare center staff, and informal caregivers. By providing resources in multiple languages and offering various engagement options, we ensure that educators and providers have the tools they need to succeed in their roles and support the children and families they serve.



Howell Mountain School

Serving over 90 students from transitional kindergarten through eighth grade, Howell Mountain School have proudly educated the children of Angwin for more than 125 years. While much has changed over time, our dedication to providing an exceptional education remains unwavering, supported by our strong and engaged community.

Grant Recipients



Community Action Napa Valley Food Bank

The organization is dedicated to combating food insecurity by providing essential nourishment to low-income individuals, families, seniors, and nonprofit organizations. Each month, it distributes approximately 118,000 pounds of food—equivalent to over 110,000 meals annually—making a significant impact in supporting and strengthening the community.



Ten Thousand Degrees of Napa Valley

The organization fosters a college-going culture by supporting socioeconomically disadvantaged students across six high schools in Napa County. The organization provides guidance on college applications and enrollment, assists with financial aid, offers community college transfer support, and provides scholarships and peer-to-peer mentoring—empowering students to access, persist in, and graduate from college.



Voices Napa

The organization serves some of the most underserved youth—those aging out of foster care and facing life on their own, often with minimal support. Supporting individuals ages 16 to 24, it provides no-cost services in health and wellness, education, employment, and housing. Remarkably, the majority of its leadership and staff are former foster youth, bringing firsthand experience and deep commitment to its mission.



Mentis

Founded in 1948, one of Napa's oldest nonprofits provides bilingual mental health services to individuals of all ages and income levels. The Foundation supports school-based youth prevention programs, including Wellness Cafes at NVUSD middle and high schools, where students can openly discuss mental health challenges, engage in group discussions, and access resources, peer support, and professional assistance.



NEWS

It serves victims of domestic violence and sexual abuse, offering shelter, counseling, and ongoing support to help survivors heal and create safe environments for themselves and their families. The majority of victims are mothers and their children, with more than 40% of sexual assault survivors being minors. Established in 1981, NEWS was formed by a group of community members who recognized the lack of safe spaces for women and children fleeing abuse. Today, NEWS staff remain the only certified domestic violence and sexual assault counselors serving Napa County.



Plan For The Next Eight Years

Deliberate, Careful Growth

Focusing on measured growth is a smart move. With Roger's ongoing commitment to additional gifts, the Foundation can steadily build its asset base without overextending. This approach minimizes risk and allows for thoughtful planning as resources expand

Increasing Impact Through Scaling Grants

As the Foundation's assets grow, increasing the size of grants to current beneficiaries ensures that each dollar has a multiplying effect. This step not only enhances the impact on those already served but also validates the Foundation's strategy of reinvesting in proven programs.

Strategic Expansion of Beneficiaries

While maintaining a clear focus on children in Napa County, the plan to add beneficiaries as resources allow demonstrates flexibility. This measured expansion means the Foundation won't dilute its mission but can extend its impact where it's most needed as financial capacity grows.

How do I donate?



Company Matching Donation: If your company offers 'matching gifts', please apply and let us know.



Securities Transfer: Contact 5T Wealth, LLC at 707-224-1340 or info@5TWealth.com.



Direct Bill Pay: Instruct your financial institution to make checks payable to "**Roger J. Trinchero Family Foundation**" and mail to 5T Wealth, LLC to the address below.

Our Information

The Roger J. Trinchero Family Foundation is a **tax-exempt charitable foundation** established on April 14, 2017. Financial summary available through publicly filed 990 PF information. Federal Determination Letter of Exemption available upon request.

Address

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82-1327850

California Corp. Number

EC4015576

5T Wealth Contact Information



Paul@5TWealth.com



707-224-1340



info@5TWealth.com



www.5TWealth.com

Thank You

Your extraordinary generosity fuels our success. Every donation, every hour volunteered, and every word of encouragement has propelled us forward. We extend our heartfelt thanks to all our donors and volunteers—your unwavering commitment and kindness have helped us overcome challenges and achieve new milestones. We are deeply grateful for your support and excited to continue this journey together.



Roger J. Trinchero
FAMILY FOUNDATION



This report was prepared by 5T Wealth, LLC. For further inquiries, please refer to the contact details below.



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