

(Reprinted from the February 1, 2009 Orange County Register online article.)



From left, Dr. Claus Bogh, Sumba Foundation health program director; nurses; Warren Allan, president of Optivest Properties, wife Kristy and family; Andrew, Trish and Mark Van Mourick.

## O.C. firm gives 10% of all revenues to charity

**Optivest Inc.**, a Dana Point investment firm gives 10% of gross revenues to charity. And 100% of the money is distributed each year, not just the interest earned.

The foundation is the outgrowth of a habit that Optivest founder Mark Van Mourick and his wife Trish started with their children years ago. In 2007, they formalized the practice with the creation of the nonprofit Optivest Foundation in 2007.

The foundation gives to Christian ministries to build orphanages and medical clinics, drill wells, plant new churches and develop church leadership. The foundation also gives educational, vocational and camp scholarships.

One recipient is the Sumba Foundation, which recently built a malaria control clinic on the Indonesian island. Above is a photo of the clinic opened in July, 2008.

The foundation not only paid for the clinic but continues to pay for supplies and the salaries of the three nurses.

Other projects of the Optivest Foundation include 500 wheelchairs sent to Jordan, an orphanage built in the Philippines and training materials to help reach and equip parents who are struggling with their teen-age children.

In 2007 the Optivest Foundation gave out \$285,000 and in 2008, \$193,000. Despite the impact of the recession and hard-hit stock market and real estate industry, the company continues to give the full 10% of all revenues, not just profits, even as employee bonuses were cut, said Trish, who runs the foundation.

That practice is in sharp contrast to Wall Street investment firms employee bonuses of \$18.4 billion that President Obama criticized as “shameful.”

Mark formed Optivest in 1987 as a registered investment adviser to manage the portfolios of 12 wealthy families. The company now provides wealth and investment management services to individuals and families nationwide.

“We hope that the foundation will encourage others to give,” Trish said, “and perhaps consider a new business model that invests in helping causes and people in our communities and around the world. The incredibly high returns of joy and satisfaction are always guaranteed.

“One of the organizations we work with gives African village women sewing machines and then teaches the women how to sew,” Trish says. “These women go on to manufacture cute little jammies that are being sold stateside in leading stores. Suddenly hundreds of barely surviving women are self-sufficient for themselves and their entire families.”

Optivest also involves employees in various local projects, such as delivering groceries during the recent Orange County brush fires.

“The employees see themselves as part of something bigger than themselves,” Trish says. “It actually increases productivity.”

