

The Community Foundation *for* Greater New Haven, Inc.

70 Audubon Street

New Haven, CT 06510

203-777-2386

www.cfgnh.org

March 19, 2026

Form ADV Part 2B – Brochure Supplement

For

Andrew F. Alden

Chief Investment Officer

This brochure supplement provides information about Andrew F. Alden that supplements The Community Foundation for Greater New Haven, Inc. brochure. A copy of that brochure precedes this supplement. Please contact Mr. Alden if the brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Andrew F. Alden is available on the SEC's website at www.adviserinfo.sec.gov under CRD# 1497067.

Item 2: Educational Background and Business Experience

Andrew F. Alden

Education

- 1988 – M.S. Finance, Rensselaer Polytechnic Institute
- 1986 – B.A. Economics, Trinity College

Business Activities

Mr. Alden joined The Community Foundation in 1994 and serves as Chief Investment Officer. In his role, he oversees the investment, compliance, and regulatory matters of The Community Foundation and The Public Charity. Mr. Alden spends a portion of his time focusing on the non-investment advisory activities of The Community Foundation and The Public Charity. He also serves as President and CEO of The Community Foundation Mission Investments Company, LLC (TCF-MIC), which is a wholly owned and controlled subsidiary of TCF and is dedicated to mission investment activities.

Item 3: Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4: Other Business Activities

Please see “Business Activities” listed above.

Item 5: Additional Compensation

Mr. Alden does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through The Community Foundation for Greater New Haven, Inc.

Item 6: Supervision

Dr. Karen DuBois-Walton, as President and CEO of The Community Foundation is responsible for supervision of Mr. Alden. She may be contacted at the phone number on this brochure supplement.

Item 7: Requirements for State Registered Advisers

1. Mr. Alden has NOT been involved in any of the events listed below.
 - a. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - i. An investment or an investment-related business or activity;
 - ii. Fraud, false statements, or omissions;
 - iii. Theft, embezzlement, or other wrongful taking of property;
 - iv. Bribery, forgery, counterfeiting, or extortion; or
 - v. Dishonest, unfair, or unethical practices.
 - b. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - i. An investment or an investment-related business or activity;
 - ii. Fraud, false statements, or omissions;
 - iii. Theft, embezzlement, or other wrongful taking of property;
 - iv. Bribery, forgery, counterfeiting, or extortion; or
 - v. Dishonest, unfair, or unethical practices.
2. Mr. Alden has NOT been the subject of a bankruptcy petition at any time.

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Form ADV Part 2B – Brochure Supplement

For

Marjorie Rice Cogguillo
Administrative Officer

This brochure supplement provides information about Majorie R. Cogguillo that supplements The Community Foundation for Greater New Haven, Inc. brochure. A copy of that brochure precedes this supplement. Please contact Ms. Cogguillo if the brochure is not included with this supplement or if you have any questions about the contents of this supplement.

Additional information about Majorie R. Cogguillo is available on the SEC's website at www.adviserinfo.sec.gov under CRD# 1552756.

Item 2: Educational Background and Business Experience

Marjorie (“Jorie”) Rice Cogguillo

Born: 1962

Education

- 1985 – Bachelor of Arts, University of Virginia

Business Activities

- 04/2021 – Present, The Community Foundation for Greater New Haven, Inc., Administrative Officer
- 01/2014 – 12/2021, Cogguillo Family Dentistry, Assistant to the President
- 12/2020 – 04/2021, BHCares, Administrative Assistant
- 11/2020 – 03/2021, Milford Department of Education, Substitute Teacher

Item 3: Disciplinary Information

Registered investment advisers are required to disclose all material facts regarding any legal or disciplinary events that would be material to your evaluation of each supervised person providing investment advice. No information is applicable to this Item.

Item 4: Other Business Activities

Ms. Cogguillo is not involved in any other business activities.

Item 5: Additional Compensation

Ms. Cogguillo does not receive any economic benefit from any person, company, or organization, in exchange for providing clients advisory services through The Community Foundation for Greater New Haven, Inc.

Item 6: Supervision

Mr. Alden, as Chief Investment Officer of The Community Foundation, is responsible for supervision of Ms. Cogguillo. He may be contacted at the phone number on this brochure supplement.

Item 7: Requirements for State Registered Advisers

1. Ms. Cogguillo has NOT been involved in any of the events listed below.
 - a. An award or otherwise being found liable in an arbitration claim alleging damages in excess of \$2,500, involving any of the following:
 - i. An investment or an investment-related business or activity;
 - ii. Fraud, false statements, or omissions;
 - iii. Theft, embezzlement, or other wrongful taking of property;
 - iv. Bribery, forgery, counterfeiting, or extortion; or
 - v. Dishonest, unfair, or unethical practices.
 - b. An award or otherwise being found liable in a civil, self-regulatory organization, or administrative proceeding involving any of the following:
 - i. An investment or an investment-related business or activity;
 - ii. Fraud, false statements, or omissions;
 - iii. Theft, embezzlement, or other wrongful taking of property;
 - iv. Bribery, forgery, counterfeiting, or extortion; or
 - v. Dishonest, unfair, or unethical practices.
2. Ms. Cogguillo has NOT been the subject of a bankruptcy petition at any time.