Where You Live

Give

2019
Donor Acknowledgement and Financials

Jackson Community Foundation
For Jackson. For good. For ever.
Our Mission: We connect people and resources to causes that strengthen and build our community. For Jackson. For good. For ever.

Our Vision: Our vision is a thriving community where all people have the opportunity to reach their fullest potential.

Our Values:
- Act with Integrity & Transparency
- Embrace Diversity & Inclusion
- Advance Equity
- Inspire Collaboration & Partnerships

Our Values Defined:
- Act with Integrity & Transparency – We preserve the public trust through independent governance, objectivity, and honest leadership. We are open and forthright with one another, donors, grantees, and the community.
- Embrace Diversity & Inclusion – We lead by example and use our position in the community to promote greater understanding and use of diversity policies and practices. We practice and champion inclusiveness and honor diverse strengths, needs, voices, and backgrounds.
- Advance Equity – We advance equity by promoting policies and practices that eliminate disparities. Our work is to bring the wisdom of community to reimagine a society that works for all.
- Inspire Collaboration & Partnerships – We value the transformative power of collaboration and partnerships. By working together on mutual interests we create a more positive and lasting impact on our community.

To learn more about how we incorporate these values, go to www.jacksoncf.org to review our:
- Equity Statement
- Audited Financials and 990
- Grant and Scholarship reports
- And More!
I would like to start by letting you know that our community is stepping up during this unprecedented time of COVID-19 and working together to address the needs of our residents and nonprofits serving our most vulnerable. Many of our nonprofit organizations have pivoted and changed their priorities in 2020, and that includes your Jackson Community Foundation. Please visit our website at www.jacksoncf.org to keep updated on ways our community is responding to today’s most pressing needs or follow us on Facebook.

2019 was an amazing year for our Foundation. We are strong, especially with help…. YOUR help. We would like to thank you, as a supporter of the Jackson Community Foundation. We hope that as you review our 2019 Annual Donor Acknowledgement and Financials, you will get a glimpse of how our donors and endowment fund holders are continuing to make a difference in our community together.

Your investment in our community gives us a permanent instrument to make grants to causes that are important to us today and for future generations. We appreciate all of you for helping us continue to make a positive impact in the community you live in, work in, and have raised your children in. For Jackson. For good. For ever.

With a thankful heart,

President & CEO
$31,207,670 net assets - ending 2019

$278,000 Administrative Expense - 17% of functional expense

Assets Under Management 2013-2019

<table>
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<tr>
<th>Year</th>
<th>Amount</th>
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<td>2013</td>
<td>14.9M</td>
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<td>2015</td>
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<tr>
<td>2017</td>
<td>23.8M</td>
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<td>2019</td>
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Rate of Return

- 10 yr: 7%
- 7 yr: 7%
- 5 yr: 6%
- 3 yr: 9%
- 1 yr: 20%

What does this mean?
We meet standards for community foundations that are operationally and legally sound. Our operational effectiveness fosters excellence in philanthropy!

$1.1 Million in total grantmaking

- Education: $173,000
- Arts, culture & recreation: $367,000
- Environmental quality: $1,500
- Economic prosperity: $20,000
- Strong individuals & families: $391,000
- Capacity building: $25,000

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Youth Advisory Committee
Our Youth Advisory Committee is a mini-foundation made up of 24 local students who review education and youth-related grants. Two of them serve on the JCF Board as voting members! In 2019, YAC awarded six grants totaling $9,400 for youth mental health, two grants totaling $6,000 for community impact needs and $850 in mini-grants to three schools.

Over 4.4 Million over 5 years!
Our Scholarships make a BIG impact! $32,000 in Legacy Scholarships were awarded to 32 Jackson County Students. $105,000 in Competitive Scholarships were awarded to 65 students! The average award was $1,200.
2019 Donors - Thank you for choosing our community

2019 Ladies Legacy Golf Outing
308 Brass Rail Bar & Grill
A Frazho Law Office, PLLC
A Healing Place, LLC
AbbVie Employee Engagement Fund
Lonnie Adair & Family
Dr. and Mrs. Brian A. Adamczyk
Dave and Tonni Ogle Adamson
Addison P. Cook III Foundation
Advanced Fluid Technologies, Inc.
Charles Adkins
Ajax Heating & Air Conditioning
Jeff and Julie Alexander
Linda M. Allen
Alvin L. Glick Foundation, Inc.
American 1 Credit Union
American Title Company of Jackson
Patricia Ames
William and Joyce Anderson
Andy and Sandy Andrews
Anonymous Donors
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Jennifer Arens
Brian and Rebecca Armstrong
Laurie Arny

Kurtis M. Ashley
Glen and Dana Ashlock
Aspen Heating & Cooling, Inc.
Matthew and Sharon Augustine
Kathleen Austin
Auto-Owners Insurance, HR Services
Dana Aymond
Barbara Baird-Pauli
Terese Bajorek
Baker College of Jackson
Beverly B. Baker
Louise Baker
Tony Baker
Hank and Rita Barnhill
Judith Barry
Emmah Bashir
Wilma J. Bass
Nikki Bateman
Jeff Beal
Alicia Beck
Rick and Cindy Bellew
Bill and Sara Benedetto
Mary Benson
Stephen Berry
Bill and Anne Best
Best, Heyns, Schroeder & Best, P.C.
Billy White Roofing, LLC
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Mark Biskupski
Christopher Blackledge

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Bloomfield Township Police - Benevolent Assoc.
Marc and Amy Bonneau
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Michelle Boorman
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Natalie Borrego
Stephanie Bosanac
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John and Barbara Brian
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Kathy and Julie Brieger
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Grant and Anne Brown
Paul and Karol Buchholz
Indrea Buckner
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Karl and Crystal Burdick
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Christine Chaparro
Bob and Karen Chaprnka
Ralph and Glenda Childs
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Shane and Andrea Clark
John and Amy Clark
Thomas L. and Jan L. Clark
Mary Clemes
Darrel and Catherine Clute
Lisa Coffey
Cliff and Jeanette Cole
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Consumers Energy Foundation
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Nancy Cooper
Laura Corn
Sue Cousins
Christopher Covalle
CP Federal Credit Union
Mari T. Craft
Sandra S. Craft
Creative Promotions of Jackson
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Dana Crouch
Sheila A. Crowley
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William Cummings
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Daniel L. Jacob & Co., Inc
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Myrna Davenport
Doug and Karen Davey
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George and Sara Davis
Kristina Davis
Dawn Food Products, Inc.
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Christina M. Dellas
Howard and Thelma Denney
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Educational Travel Consultant Services
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Trish Fletcher
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Henry Ford Allegiance Health Foundation
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Betsy Holzworth
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Brandon and Stacey Hughes
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Inosencio and Fisk, PLLC
Jocca Family Dentistry
Sue Ellen Isackson
Jackson Auto Co.
Jackson College
Jackson County Chamber of Commerce
Jackson County Intermediate School-District
Jackson Glass Works, Inc.
Jackson High School

Jackson Host Lions Club
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Kristen Johantgen
Willard H. Johnson
Aaron and Anne Jones
Judith Jones
Ronald and Marvel Jones
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Jan Kalahar
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Dan and Molly Kaser
Amber Keathley
Charles Keeling
Kathryn Kersmaekers
Roy and Lois Kelly
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Gary and Lynn Kenworthy
Keyser Insurance Group
Rhapsedy Kiley
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Kiwanis Racing for Dollars
Wendy Klintworth
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Scott Mead
Ronald Mealoy
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Alicia Schneider
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MYFIVE, INC - Myers Family Little Caesars of Jackson
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Larry and Marilyn Scott
Sandra Seguin
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<td>Nancy and Cindy Walker</td>
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<tr>
<td>James and Judith Wilson</td>
<td></td>
</tr>
<tr>
<td>Julie Wirebaugh</td>
<td></td>
</tr>
<tr>
<td>Joe and Judy Wolfe</td>
<td></td>
</tr>
<tr>
<td>Chuck and Sue Wrzesinski</td>
<td></td>
</tr>
<tr>
<td>Greg Zeller</td>
<td></td>
</tr>
<tr>
<td>Jay and Melissa Ziemba</td>
<td></td>
</tr>
<tr>
<td>TKM Farms, Inc.</td>
<td></td>
</tr>
<tr>
<td>Cathie Timberlake</td>
<td></td>
</tr>
</tbody>
</table>
Carter-Wickwire Society

The Jackson Community Foundation was founded in 1948 with two very special gifts. During World War II, the families of Lt. John L. Carter and Pfc. John Gilbert Wickwire donated proceeds from life insurance policies that were purchased in the name of their sons, both of whom lost their lives in battle. The Jackson War Chest accepted the insurance contribution, plus additional gifts added by each family. When discussion of starting a community foundation began, a total of $20,000 was transferred to begin a permanent endowment for Jackson County.

The Carter and Wickwire families understood the importance of planning for the future and creating a legacy for their families. By naming the Jackson Community Foundation in your will, you can join a distinctive list of individuals and families who are doing the same. Become a Carter-Wickwire Society member today!
# 2019 Financials

## ASSETS

<table>
<thead>
<tr>
<th>FOR YEAR ENDING</th>
<th>12/31/2019</th>
<th>12/31/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$783,795</td>
<td>$489,903</td>
</tr>
<tr>
<td>Receivables</td>
<td>$4,074</td>
<td>$17,358</td>
</tr>
<tr>
<td>Prepaid Expenses</td>
<td>$8,029</td>
<td>$15,648</td>
</tr>
<tr>
<td><strong>Total Current Assets</strong></td>
<td>$795,898</td>
<td>$522,909</td>
</tr>
<tr>
<td>Investments</td>
<td>$29,506,657</td>
<td>$24,651,552</td>
</tr>
<tr>
<td>Furniture &amp; Equipment, Net</td>
<td>$20,783</td>
<td>$18,293</td>
</tr>
<tr>
<td>Beneficial Interest in Trust</td>
<td>$2,840,889</td>
<td>$2,006,728</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td>$33,164,227</td>
<td>$27,199,482</td>
</tr>
</tbody>
</table>

## LIABILITIES AND NET ASSETS

<table>
<thead>
<tr>
<th>LIABILITIES</th>
<th>12/31/2019</th>
<th>12/31/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Liabilities</td>
<td>$27,138</td>
<td>$54,137</td>
</tr>
<tr>
<td>Assets Held for Agency Funds</td>
<td>$1,929,419</td>
<td>$1,671,076</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES</strong></td>
<td>$1,956,557</td>
<td>$1,725,213</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NET ASSETS</th>
<th>12/31/2019</th>
<th>12/31/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Without Donor Restrictions</td>
<td>$26,809,631</td>
<td>$21,816,078</td>
</tr>
<tr>
<td>With Donor Restrictions</td>
<td>$4,398,039</td>
<td>$3,658,191</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td>$31,207,670</td>
<td>$25,474,269</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TOTAL LIABILITIES AND NET ASSETS</th>
<th>12/31/2019</th>
<th>12/31/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$33,164,227</td>
<td>$27,199,482</td>
</tr>
</tbody>
</table>

## ACTIVITIES

<table>
<thead>
<tr>
<th>FOR YEAR ENDING</th>
<th>12/31/2019</th>
<th>12/31/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$1,869,295</td>
<td>$1,280,821</td>
</tr>
<tr>
<td>Net Investment Income (Loss)</td>
<td>$4,600,375</td>
<td>$(1,633,516)</td>
</tr>
<tr>
<td>Change in Value Beneficial Interest</td>
<td>$834,161</td>
<td>$88,255</td>
</tr>
<tr>
<td>Other Support</td>
<td>$102,181</td>
<td>$80,852</td>
</tr>
<tr>
<td><strong>TOTAL REVENUES AND GAINS (LOSSES)</strong></td>
<td>$7,406,012</td>
<td>$(183,588)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th>12/31/2019</th>
<th>12/31/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>$1,062,858</td>
<td>$746,977</td>
</tr>
<tr>
<td>Grants and Scholarships</td>
<td>$205,715</td>
<td>$236,102</td>
</tr>
<tr>
<td>Other Program Services</td>
<td>$1,268,573</td>
<td>$983,079</td>
</tr>
<tr>
<td>Total Program Services</td>
<td>$278,346</td>
<td>$194,864</td>
</tr>
<tr>
<td>Management and General</td>
<td>$125,692</td>
<td>$104,203</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$5,734,011</td>
<td>$1,465,734</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td>$1,672,611</td>
<td>$1,282,146</td>
</tr>
<tr>
<td>Change in Net Assets</td>
<td>$25,474,269</td>
<td>$26,940,003</td>
</tr>
<tr>
<td>Net Assets - Beginning of Year</td>
<td>$31,207,670</td>
<td>$25,474,269</td>
</tr>
<tr>
<td><strong>NET ASSETS - END OF YEAR</strong></td>
<td>$31,207,670</td>
<td>$25,474,269</td>
</tr>
</tbody>
</table>
Accountability: The Jackson Community Foundation is fully accountable to the donors and citizens of this community. An independent audit is conducted annually, currently conducted by Yeo & Yeo, PLLC. An unqualified opinion of the Jackson Community Foundation was issued for 2018-2019. Please contact our office if you would like a copy of the audited financial statements. If you would like to request a copy of the audited financial statements, IRS Form 990 or any of the Foundation policies, you can also visit www.jacksoncf.org. Thank you to our investment consultants at The Moore Schropp Group for helping to produce this publication!