



Your Partner in Philanthropy

Your clients rely on your guidance to make important financial decisions. When it comes to charitable giving, we can partner with you to simplify their giving and amplify their impact.

Start the Conversation

Your clients rely on you to guide them through the dizzying maze of tax management and estate planning. Ask them a simple question about charitable giving, and the Jackson Community Foundation (JCF) can help you deliver good answers. We have flexible options to meet their charitable goals.

When you work with JCF, you will not only have access to a host of charitable giving options for your clients, but also a committed staff with extensive knowledge of the community and the latest trends in philanthropy. You can feel confident that your client's charitable and financial goals will be our top priority. Take a look at the many benefits of working with the Foundation:

Personalized service: We work with you to develop a giving approach that matches your clients' interests and addresses their tax-planning needs. We help integrate charitable giving and engage family members.

Community knowledge: Our staff monitors community need: education, the environmental quality, health, the arts, strong children and families, and economic development. We convene people and organizations to address issues and explore opportunities together.

Investment expertise: JCF currently engages the Iles Schropp Group in Saginaw, MI as our investment consultant. This relationship gives us access to a mature, well-diversified investment portfolio managed by a seasoned staff with an excellent performance record and knowledgeable about community foundations.

Experience with non-cash gifts: In addition to gifts of cash and marketable securities, we can accept gifts of real estate, closely held businesses, and other non-cash assets. We offer trusteeship for charitable trusts where the Community Foundation is a beneficiary, and we handle trust and private foundation terminations.

Accountability: We are responsible stewards of your gift. We preserve and execute donor intent in perpetuity. We conduct a full review of all nonprofits prior to grant distributions. We maintain communication with these agencies to ensure that your client's wishes are fulfilled.

Flexibility: While we focus on the needs of Jackson County, we can make grants to charities outside the region.

Convenience: Your clients have 24/7 access to their fund information. They can submit online grant recommendations, view their fund balance, and review transaction history. They can make additional contributions to their grant via credit card.

Anonymity: We can establish a fund, accept a gift, or make a grant in a way that will protect your client's privacy.

In a nutshell, we make your job easier by being a partner in fulfilling your client's charitable intent. To learn more about the Jackson Community Foundation, call 517-787-1321 or email Monica Moser at mmoser@jacksoncf.org.

Your Philanthropic Partner

We consider ourselves an extension of your team, providing your client with the same customized, superior service they have come to expect. Once we identify the appropriate giving solution to support their charitable passions, set up is quick and convenient. Our gift agreements are just a few pages and can be executed in one brief meeting.

Our charitable funds:

- **Named Unrestricted funds** enable the Foundation to use donor dollars to address identified need in the community and honor the donor and/or their family in perpetuity.
- **Field-of-interest funds** channel donors' giving to an issue or area they find important, such as education, the arts, or healthcare.
- **Designated funds** and **Agency funds** allow for support to specific charitable organizations including nonprofits and religious organizations. We can also help support units of government (city, county, township, etc.) and public schools when funds are used to provide nonessential, quality-of-life enhancing goods and services not typically funded through taxes.
- **Scholarship funds** can be based on field of study, community involvement, merit, or financial need. Our staff will work with your client to establish guidelines as to who can receive assistance from the fund.
- **Donor-advised funds** enable your clients to identify charitable organizations addressing issues they find important. Your clients then recommend grants to those charities they wish to support at their convenience and can change from year to year. It is like having their own foundation, only easier as we serve as their staff to fulfill their wishes.

What is a community foundation?

A community foundation is a public charity that helps your clients achieve their philanthropic goals through named charitable funds. From these funds, grants are made primarily to benefit a defined geographical area. Each community foundation is overseen by a volunteer board and run by professionals with expertise in community need. Community foundations are committed to informing their donors and the community about the challenges facing their area as well as identifying promising solutions.

The Jackson Community Foundation History

The Jackson County War Committee, established in 1942, began its disbanding in 1947. 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 families 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. Today our endowed assets are over \$27 Million.

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