



2025 - 2026  
Annual Report  
Calendar





## IMAGINE

We imagine a community with heart, purpose, and a resolve to create a brighter, more just and compassionate future for all. We've come a long way from our cover photo of Jackson in 1908. From programs that lift up our neighbors to initiatives that expand opportunity and create lasting change, your generosity has fueled our progress. We humbly ask that you consider making a gift, in any amount, to help us keep moving forward. Your support is not only an encouragement to us, but it allows more money for programs working to solve Jackson County's greatest issues. Thank you again for believing in the work we are doing - we appreciate you!

With a grateful heart,

Monica Moser, President & CEO



## INVEST

When we invest in community, we plant seeds that grow far beyond our lifetime. Since 2024, 13 new endowment funds were established, investing \$887,000 in Jackson County. Each fund's purpose is different - from scholarships to special projects. Some donors have chosen to be more involved in grantmaking while others prefer the Foundation "do the work" for them. Regardless of your charitable needs, we have many flexible options to help. With an endowed fund, the initial gift is invested and never touched while a portion of the income is used for grantmaking. This allows your fund to continue to grow and help our community for generations to come! Learn more on the June page!



## IMPACT

Impact investing is the act of *purposefully making investments that help generate positive social benefits while generating financial return*. This year, we are dipping our toes with an impact investment strategy to create positive change in Jackson County outside of our traditional grantmaking. In the last few months, our talented Board and Finance Committee members have carefully reviewed several impact investment opportunities and are working toward finalizing an agreement with one of the projects! In addition to supporting a plan that will enhance our community, the venture will also provide new investment dollars to be used toward future projects. Watch our Facebook page for new developments on this exciting, new endeavor for JCF and Jackson County!!

December

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February

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22	23	24	25	26	27	28



# JANUARY

SUNDAY

MONDAY



TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

				1  New Year's Day	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19  MLK Jr. Day	20	21	22	23	24
25	26	27	28	29	30	31

# Community Collaboration & Leadership

JCF STAFF SUPPORTS THE FOLLOWING ORGANIZATIONS BY PROVIDING LEADERSHIP & SUPPORT THROUGH THEIR PARTICIPATION



**Martin Luther King Corridor Improvement Authority**

## **MARTIN LUTHER KING CORRIDOR IMPROVEMENT**

**AUTHORITY** Established by unanimous vote of the Jackson City Council in 2020, the MLK Corridor Improvement Authority is a ten member board guiding redevelopment along MLK Drive and Prospect Street. In partnership with local citizens and business owners, the Authority aims to create a vibrant, competitive corridor. The Jackson Community Foundation supports the Entrepreneurial Fund Grant process through December 31, 2026, providing structure for both entrepreneurial and real estate grantmaking.

**EMERGENCY NEEDS COALITION** is an informal group of non-profit, government, and faith-based organizations that discuss needs in the community and the ever changing sources of assistance that is available for those in need.

**ADVOCATES AND LEADERS FOR POLICE AND COMMUNITY TRUST (ALPACT)** The purpose of ALPACT is to examine issues affecting police and community relations and ensure equitable enforcement of laws.

**JACKSON COLLABORATIVE NETWORK** is a Collective Impact network of more than 500 members that includes local educators, business leaders, social service providers, residents with lived experiences, physical and mental health providers, philanthropy and local elected officials. Network members are committed to working together in alignment with shared values of equity, authentic engagement, and continuous learning to identify and address the root causes of issues that affect the success and well-being of Jackson County residents.

**HUMAN SERVICE COORDINATING ALLIANCE (HSCA)** is Jackson County's only director level collaborative among social service organizations. Leaders of the community gather together regularly to discuss how to provide and deliver the best human services possible to our community with the belief that we are stronger and more effective working together.

**EAST MICHIGAN AVENUE CORRIDOR STEERING COMMITTEE** is a collaborative leadership and workgroup with a mission to stimulate economic growth and strengthen community through placemaking investments. The purpose is to transform East Michigan Ave. into a safe, desirable district with accessible healthcare, thriving businesses, and cultural initiatives to create a walkable, healthy, and inclusive downtown district.

**DRIVE JACKSON STEERING COMMITTEE** is a community-led initiative developing a 20-year Strategic Vision Plan for Jackson County. The Jackson County Chamber of Commerce, Accelerate Jackson and the JCF have joined together to serve as the Steering Committee. The Plan will:

- Define a shared vision and core community values.
- Address emerging trends and growth opportunities
- Provide actionable policies, programs, and projects.
- Offer a flexible roadmap for long-term success.



January

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March

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# FEBRUARY

SUNDAY

MONDAY


TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

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15	16  President's Day	17	18	19	20	21
22	23	24	25	26	27	28

Notes:

# Youth Advisory Committee

The Youth Advisory Committee (YAC) was established in 1989 through a challenge grant from the W. K. Kellogg Foundation. Kellogg's intent was to establish youth as philanthropists and build permanent endowment funds to meet youth-related needs within each community. Since 1989, our YAC has distributed more than \$1M to Jackson County non-profits to benefit youth. In 2014, YAC joined a handful of other foundations when the Board approved two YAC Committee Member's to serve as Trustees and voting members of the Board. If you know of a Jackson County student in 8th-12th grade who would like to join, email [mbouman@jacksoncf.org](mailto:mbouman@jacksoncf.org) for details!





February

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April

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MARCH

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MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

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# INVEST Women's Education

Cheryl Norey worked for Michigan Automotive Compressor, Inc. (MACI) in Jackson, Michigan for 31 years in community relations and communications. Cheryl was the fund representative for the MACI Youth Fund for many years and developed a warm relationship with our staff. She was always willing to help in any way and her professionalism and love for our community was obvious to all that have shared time with her.

"Cheryl Norey dedicated over thirty years to serving Jackson County. Through her estate, she endowed a \$2 million academic scholarship for girls and women in the community she loved. As Cheryl's executor, I've had the privilege of working with the Jackson Community Foundation to realize her vision," said Leah Robin, Fund Representative for the Cheryl Norey Memorial Scholarship Fund, "The Foundation staff's professionalism, care, and deep local knowledge ensured a strong financial foundation and a seamless award process. With their partnership, we reached a meaningful milestone in 2025: awarding the first scholarships in Cheryl's name and continuing her legacy of care for Jackson County."

## HOW CAN I INVEST?

With as little as \$10,000, you can start your own Donor Advised Fund and start your family's legacy today! It's simple, flexible, and an effective way to support the charitable causes you are most passionate about! Learn more here:





March

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31						

APRIL

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

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**Board Members** front left to rt: Jeremy Frew, Geri Phelps, Rajanya Ghosh, Stephanie Belcher, Michelle Fowler, and Carl Spaeth. Back left to rt: Rick Mills, Steve Noble, Nick Reynolds, Stuart Smith, Jeff Karmol, Tobin Dunigan, and KC Sykes. *Not pictured: Fatima Bashir, Marcus Gill, Victoria Moore, Sheila Patterson, Tovah Sheldon, and Angela Wetherby.*



**Staff Members** front left to rt: Kelly Froedtert - Operations Director, Monica Moser - President & CEO, and Stephanie Schiro - Grant Program Director. Back left to rt: Monica Bouman - Scholarship & Youth Program Director, Shayla Williams - Administrative Assistant, Lisa McDaniel - Marketing & Communications Director, and Erik Lyman - Donor & Community Relationship Director.

## CARTER WICKWIRE SOCIETY

The Carter and Wickwire Society is a distinctive group of individuals who have made a commitment to our community's future and created a legacy for their families by naming the JCF in their estate plan.

Matthew D. and  
-Sharon A. Augustine  
Mary Baird  
Jackie and Jerry Booth  
Carole and John Briggs  
John and Lisa Butterfield  
Jim and Tonni Ogle Chapel  
Susan Diebold  
Georgia and Travis Fojtasek  
Jim and Joyce Grace

Kathleen Lincoln  
Mary Theresa Mills Family  
Rick Sigers  
Sandra Svoboda  
Ric Walton  
Carlene Walz  
Dale Moretz  
Richard Allen Iverson  
Monica Moser and  
- Steven Trosin

Marcia MacCready  
Chad Noble  
Hendrik and  
-Stephanie Schuur  
Carl Spaeth III  
Drs. James and  
-Wendelyn Serino  
Lisa Gaynier and  
-Hap LaRoe

We honor the following individuals who left JCF in their estate plan and fulfilled their bequest upon their death:

To learn more or to join:

Larry Anto  
Jody Bacon  
Larry Bullen  
Fred J. and Rachel B. Kulas  
Al Spiess, Jr.  
Barbara Truax





April

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June

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MAY

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24/31	25  Memorial Day	26	27	28	29	30



## GROW YOUR GIVING THROUGH AN ENDOWMENT FUND

### What is an Endowment Fund?

It's a fund where the original gift...

is invested and will grow over time...

with only the income (interest) from the fund spent on causes you love...

that will support your community forever.

**2001 (year 1)**

The E. Marlin and Evelyn A. Jones and Extended Family Endowment Fund



The Fund was established with a **\$11,000** gift to the Jackson Community Foundation in 2001.

Initial gift grows & pays out the annual spendable allowed each year

**2024 (after 23 years)**



**\$738,130** in cumulative gifts  
**\$113,106** in cumulative grants  
**\$932,620** endowment balance

Original balance & grants distributed is growing.

**2031 (after 30 years)\***



**\$0** future gifts unknown  
**\$341,841** in cumulative grants  
**\$999,985** endowment balance

Original balance & grants distributed will continue to grow.

\* Estimated growth rate of 6.0 % for future years and annual distribution of 5%.



May

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31						

July

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JUNE

SUNDAY

MONDAY


TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

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7	8	9	10	11	12	13
14	15	16	17	18	19  Juneteenth	20
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# IMAGINE

Our past & future

The Gospel Army Black History Group received a \$4,000 grant from the Community Needs Fund. The grant was designated for the purchase of essential equipment, uniforms for student participants, educational displays, and assistance with travel expenses to events and presentations across the region. Because of that investment, they expanded to include 25 local students, now making them the largest student-led living history group in the nation—and the only one prominently composed of minority youth. The momentum generated by this program has begun to draw national attention, with historians, museums, and educators across the country taking note of the innovative work happening here in our community.

This grant has also helped open new doors for young Black men in Jackson County in ways that reach far beyond classroom learning. Through their involvement in the Gospel Army Black History Group, students are developing into articulate, confident, and community-minded young leaders. They are learning how to research, present, and preserve history, but they are also finding their voice, their purpose, and their place in a story that has too often left them out.



June

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# JULY

SUNDAY

MONDAY


TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

			1	2	3	4  Independence Day
5	6	7	8	9	10	11
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26	27	28	29	30	31	

2024

AT A  
GLANCE

323  
DONORS

169  
VOLUNTEERS

8  
NEW FUNDS

322  
FUNDS

Arts, Culture & Shared  
Experiences \$148,277



Social & Legal Systemic  
Change \$52,226

Strong Individuals &  
Families \$243,030



Physical, Emotional &  
Mental Health \$176,746

Educational Readiness &  
Success for All \$980,403



Organizational  
Capacity Building  
\$97,405



Youth Development  
\$113,180



Environmental Quality,  
Protection & Beautification  
\$258,622

Scholarships \$172,900

## ASSET UNDER Management

2017 - 26.6M

2019 - 29.2M

2021 - 37.6M

2022 - 38.0M

2024 - 48.3M

10 yr - 6.75%

7 yr - 7.28%

5 yr - 7.63%

3 yr - 3.47%

1 yr - 10.57%



93 JCF Competitive Scholarships were awarded to 71 students totaling \$180,900!

# \$2.2 Million in Grants



CFNS

ACCREDITED  
FOUNDATION

The Council on Foundations Accreditation Program certifies U.S. community foundations that meet and exceed federal and state law requirements in practice and by policy. The accreditation process is rigorous, and undertaking it demonstrates a community foundation's commitment to excellence and accountability to its donors, its community, policymakers, and the public.



July

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Septmeber

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# AUGUST

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

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23/30	24/31	25	26	27	28	29

# INVEST Aging with Dignity

Thome PACE received a \$20,000 Community Needs Grant. They serve low-income older adults in Jackson County. PACE's team of professionals provides participants with a "one-stop" shop model for all their healthcare needs, including comprehensive medical, occupational and physical therapy, pharmacy needs, nutrition and meals, health education, social and recreational activities and door-to-door transportation. "This grant from the Jackson Community Foundation has allowed us to provide needed home repairs for our PACE participants, helping them to continue living safely and independently in their own home and keeping them out of a nursing home setting," said Lisa French, "One success story that illustrates the importance of this grant for the older adults we serve is Maggie and her younger brother George. George is a double amputee, and Maggie was providing all his care before they learned about Thome PACE. It was difficult for Maggie, at 76, to be George's only caregiver, caring for all of his needs, and she struggled to keep up with housework. The flooring was falling apart, had holes, and some places had no flooring at all. Maggie reported she had fallen a few times trying to navigate her home. It had become a barrier for George and Maggie to live safely and independently in their home. Thanks to grant resources from JCF, PACE was able to replace the flooring in Maggie and George's home."





August

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October

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# SEPTEMBER

SUNDAY

MONDAY


TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

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6	7	8  Labor Day	9	10	11	12
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# IMPACT Foster Families

The mission of Birth Brite is to deliver hope and joy to children in foster care. Birth Brite is a 501(c)(3) non-profit organization located in Jackson. Their programs include Birth Brite Foster Closet and Brite Bound Literacy.

"By providing access to new and gently used items entirely for free through our foster closet, we are able to meet the immediate needs of children in crisis as they enter foster care. We want to be sure that the children have the basic items they need, as well as comfort items; and to know that they are valued, worthy and cared for. This goal also works along with helping foster parents know that they are not alone, and that there is a supportive resource they can utilize, so they are not left to go shop for items every time they accept a new child into their home." Monique Zantop and Tia Parker, co-founders.

## WHO CAN APPLY FOR A GRANT?

- 501(c)3 Nonprofits
- Governmental Agencies
- School Districts
- Churches
- Community Groups
- Out of County organizations serving Jackson County

Scan here  
to see if  
you qualify!





September

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November

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# OCTOBER

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

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ASSETS		
FOR YEAR ENDING	12/31/2024	12/31/2023
Cash	\$1,083,761	\$380,825
Receivables	153,929	18,158
Prepaid Expenses	6,797	2,634
Total Current Assets	1,244,487	401,617
Investments	48,379,727	44,620,479
Furniture & Equipment, Net	29,953	37,889
Operating Lease	366,076	219,261
Beneficial Interest in Trust	5,081,658	4,288,068
<b>TOTAL ASSETS</b>	<b>\$55,101,901</b>	<b>\$49,567,314</b>
LIABILITIES AND NET ASSETS		
LIABILITIES		
Current Liabilities	\$64,169	\$85,311
Assets Held for Agency Funds	2,425,056	2,238,721
Operating Lease	346,438	183,670
TOTAL LIABILITIES	2,835,663	2,507,702
NET ASSETS		
Without Donor Restrictions	45,126,317	41,169,885
With Donor Restrictions	7,139,921	5,889,727
Total Net Assets	52,266,238	47,059,612
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$55,101,901</b>	<b>\$49,567,314</b>

ACTIVITIES		
FOR YEAR ENDING	12/31/2024	12/31/2023
Contributions	\$2,911,216	\$4,071,215
Net Investment Income	4,509,073	5,441,347
Change in Value Beneficial Interest	821,869	659,064
Other Support	33,930	47,950
<b>TOTAL REVENUES AND GAINS</b>	<b>\$8,276,088</b>	<b>\$10,219,576</b>
EXPENSES		
PROGRAM SERVICES		
Grants and Scholarships	\$2,162,869	\$2,094,867
Other Program Services	383,737	252,993
Total Program Services	2,546,606	2,347,860
Management and General	390,218	374,941
Fundraising	132,638	146,164
TOTAL EXPENSES	3,069,462	2,868,965
Change in Net Assets	5,206,626	7,350,611
Net Assets - Beginning of Year	47,059,612	39,709,001
<b>NET ASSETS - END OF YEAR</b>	<b>\$52,266,238</b>	<b>\$47,059,612</b>



# MERIDIAN

## Wealth Management

The Grace Group & PARTNERS

**NEW LOCATION!**

2533 Spring Arbor Road, Suite A  
Jackson, Michigan 49203  
www.meridianwmmi.com Ph: 1-800-533-8860

Securities and advisory services offered through &PARTNERS, LLC, a registered broker-dealer and investment advisor, Member FINRA/SIPC. Meridian Wealth Management is a separate entity from &PARTNERS, LLC.

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## TRUE TO OUR COMMUNITY IS WHO WE ARE.

Join Today at [TRUECCU.com](https://trueccu.com)

Federally Insured by NCUA 



October

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December

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# NOVEMBER

SUNDAY

MONDAY



TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

1	2	3	4	5	6	7
8	9	10	11  Veterans Day	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26  Thanksgiving	27	28
29	30					



# INVEST Community



John and Lisa Butterfield recently established the You Matter Fund, a Donor Advised Fund. Their first grant round focused on Driver's Education for low-income students. Here is Lisa's reply on why they started their fund "When John and I married, I was teaching and John worked for his father at Jack V. Butterfield Investment agency. We were both 25 years old and thought we had life in order. Six months later, Jack died suddenly. We realized John would be going back to work alone so we drove to his office in the Harris Building downtown feeling overwhelmed trying to get a handle on the unknown. We walked into Jack's office, and was surprised to find Jack's friend, Chuck Aymond, waiting for us. He looked at John with his hands placed on the desk, and said, "Come sit down John, this is now yours". What we heard was, "You can do it! You're stronger than you think! I believe in you!" John sat down at the desk and has continued to lead the business for the past 42 years. John needed help and created a Board with many of Jack's successful friends to help. Because of their willingness to step into a young person's life, to give him encouragement by sharing their resources, many lives were touched, and we are beyond grateful. We now have 3 of our four boys working with John and continuing the legacy that started with John's Grandfather Harold Homer Butterfield in 1938. We know first-hand the power of kindness and standing alongside others. The power of the words, We believe in you! We have nine Grandchildren that I pray will carry on this legacy in their own lives". Lisa Butterfield

Want to start your family's legacy? Call for an appointment at 517-787-1321 or email [jcf@jacksoncf.org](mailto:jcf@jacksoncf.org) today!

## How does a community foundation work? We make giving easy with **KNOWLEDGE, EXPERTISE, & LEADERSHIP!**

**1** Anyone can be a donor and make a gift of any size. Some donations are pooled together to make a greater impact like the Community Needs Fund.

**2** We work with our donors to help them realize their philanthropic goals. Maybe you're are passionate about pets or maybe you're undecided. We are here to help! We continually monitor the emerging needs in Jackson County.

**3** We can help you establish your own endowment fund or give to an existing fund that matches your interests.

**4** Donor's gifts are pooled with our endowed assets, invested with careful stewardship, the income is used to make grants.

**5** We distribute grants to all corners of Jackson County in many different areas including arts & culture, education, health and more!

**6** We invest in Jackson County in many ways including grants, community leadership, and building partnerships that strengthen our community today, and into the future.

November

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

January

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						



# DECEMBER

SUNDAY

MONDAY




TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24  Christmas Eve	25  Christmas	26
27	28	29	30	31  New Year's Eve		

## Our Donors INVEST in Community

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Wendy Kalahar

## Regina Griffus Memorial Fund



"To honor our Mother's legacy of caring for our community, we established the Regina Griffus Memorial Fund. We chose to partner with the Jackson Community Foundation because they have the deep roots to know where the needs are greatest. They make it simple to ensure her compassionate spirit lives on." -The Griffus Family  
Since the Fund was established in 2024, \$95,650 in grants were made to 34 organizations.

### continued

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*We make every effort to ensure a complete and accurate list. Unfortunately, mistakes can happen. Please notify the office if your name is missing or inaccurate. Thank you!*



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Hendrik & Stephanie Schuur  
Nick Sheldon  
Carlene Walz  
The JCF Board and Outgoing  
-Chair Renell Weathers  
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Charles and Susan Wrzesinski's 60th  
-Wedding Anniversary

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Amy Bonneau  
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Jim Brian  
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## 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, P.C. An unmodified opinion of the Jackson Community Foundation was issued for 2024. Please contact the Jackson Community Foundation office if you would like a copy of the audited financial statements, IRS Form 990 or any of the Jackson Community Foundation's Policies or go to [jacksoncf.org](http://jacksoncf.org).*



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