

CONNECTING

**PEOPLE**   
TO **CAUSES**

THAT MATTER



2023 Donor Acknowledgement and Financials



**For Ever. For Jackson. For Good. For Good.**

**Our Mission**

We connect people and resources to causes that strengthen and build our community.

**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**

## Note from Our President & CEO

Most nonprofit organizations have a very specific mission, whereas the mission of the Jackson Community Foundation is broad:

*"To connect people and resources to causes that strengthen and build our community.  
For Jackson. For good. For ever."*

We don't provide services but rather financial support to the organizations that do, whom we consider specialists in their field. This gives us the unique flexibility to address the ever-changing needs of Jackson County. Through generous donors like you, we pool dollars together and invest them. They continue to grow and increase the power of your donation! Gifts to the Community Needs Fund are used for exactly that; a committee reviews and identifies where the need is the greatest and then distributes the earnings through grants to our local nonprofits.

Some donors want to be more involved in the grant process and establish their own fund. This allows them to focus on the causes they care most about and establish a legacy for them and their family. And most importantly, we are different because we are *"For ever."* Most of the endowment funds established are permanent. The principal is never spent but invested to provide a long-term source of income to our community long after we are gone.

How can you help? We exist because those that started community foundations in 1914 believed that there should be a place where every gift matters, no matter the size. Join us in giving back to the community in which you have lived, worked, and raised your family. Every gift of every size matters and helps to secure a bright future for generations to come!



A handwritten signature in cursive script that reads "Monica Moser".

With a grateful heart, Monica Moser, President & CEO



# 2023 at a Glance

**Our Mission**  
 We connect people & resources to causes that strengthen & build our community.  
**For Jackson. For good. For ever.**

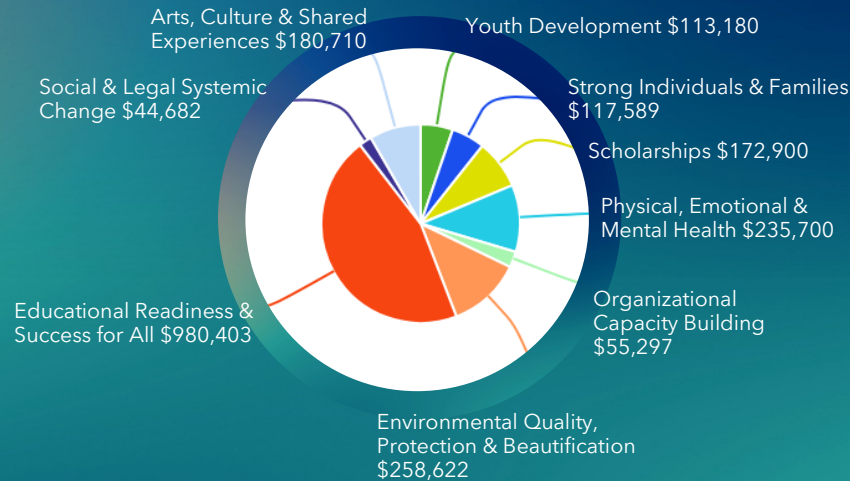


**Scholarships**  
 79 JCF Competitive Scholarships were awarded to 64 students totaling \$155,900!

**\$49,567,314 net assets**

**\$2.15 MILLION in GRANTS**

ASSET UNDER Management	
2016-25.2M	
2018-27.1M	
2020-33.2M	
2023 - 45.0M	
10 yr - 5.96%	
7 yr - 7.93%	
5 yr - 9.48%	
3 yr - 5.15%	
1 yr - 14.91%	



**Youth Advisory Committee**

is a mini-foundation made up of 32 local students who review education & youth-related grant applications. Two students are elected, voting members of our Board. In 2023, YAC awarded 23 grants totaling \$34,445.33.

## Connecting **PEOPLE** to **CAUSES** that matter - **Thank you Donors!**

William Abbott  
Dr. and Mrs. Brian A. Adamczyk  
Tonni Ogle Adamson  
Dr. and Mrs. Robert D. Albertson, III  
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Alvin L. Glick Foundation, Inc.  
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American 1 Credit Union  
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College and Career Access Center  
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James and Chlorita Conner  
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Doug and Karen Davey  
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George and Sara Davis  
Christina M. Dellas  
Joseph DeLombarde  
Delta Dental of Michigan  
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Russell Desy  
Bruce Deverman  
Susan L. Diebold  
Jane Dillon  
John and Sue Dixon

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-Fund of the Comerica Charitable Trust  
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Daniel Kapp  
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Kathryn Keersmaekers  
Kelly Fuels, Inc.  
David Kendall

## Connecting **PEOPLE** to **CAUSES** that matter - **Thank you Donors!**

Nicholas Kennedy  
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Kiwanis Club of Jackson MI  
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Gary and Jann Krupa  
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David J. Ogle  
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Kari Pardoe  
James A. Parker  
Laurie Parker  
Howard Patch

## Connecting **PEOPLE** to **CAUSES** that matter - **Thank you Donors!**

Steven and Jill Patch  
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The Natalie Field Foundation  
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TKM Farms, Inc.  
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Sheila Troxel and Karl Grieve  
True Community Credit Union  
Suzette Turpel  
Vandercook Lake School Employees  
Lisa Veon  
Vicki Vincent  
William and Diana Wagner  
Mason Wakefield  
Richard Wakefield



# Connecting **PEOPLE** to **CAUSES** that matter - **Thank you Donors!**

Cathy Walker  
 K. Andrew and Julia Walz  
 Mary Walz and Neil Johnston  
 Patrick and Suzanne Walz  
 Susan Walz and Jeffrey Goldberg  
 Craig and Penny Ward  
 Joan and James Ware  
 Frank and Renell Weathers  
 Nikki Weeks  
 Ed and Linda Wegrzyn  
 Sarah Weissman  
 Susan and Jack Westbrooks  
 Western Educational Foundation  
 Western High School Class of 1973  
 Marcela Westrate  
 Angela Wetherby  
 Larry and Julie Wetherby  
 Don and Lucy White  
 Harold and Louise White  
 James White  
 Dennis and Marcia Whitehead  
 Craig and Susan Whitmore  
 Jonathan and Melissa Tucker Williams  
 Phil and Pat Willis  
 Phil and Pat Willis Foundation  
 Beverly Wisniach  
 Joe and Judy Wolfe

Ed Woods  
 Michelle Woods  
 Suzanne Woolworth  
 Linda Wright  
 Chuck and Sue Wrzesinski  
 Rick and Lynette Wyllis  
 Greg Zeller  
 John and Patricia Ziembra

## IN MEMORY

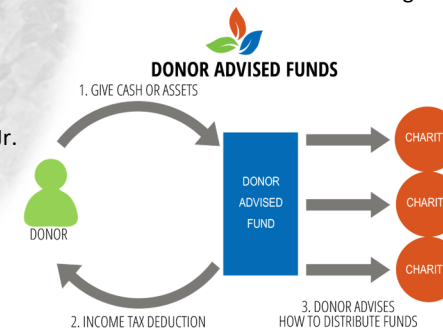


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 Dolores Abbott  
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 Karen Abbott  
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 Jody C. Bacon  
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## IN HONOR

Carolyn Bloodworth  
 Tom and Nancy Evanson  
 Robert Fisher  
 Jim and Marsha Haehnle  
 Honorable Carlene Walz Lefere  
 Victoria Moore  
 Monica Moser and  
 -her great Team!  
 Hendrik Schuur  
 Nick Sheldon  
 Robert and Donna Simmons  
 Mary Walz and Neil Johnston  
 Patrick and Suzanne Walz  
 Susan Walz and Jeff Goldberg



*\*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!*

# Carter Wickwire Society

**What is the Carter Wickwire Society?** During World War II, the families of Lt. John L. Carter and Pfc. John Gilbert Wickwire donated proceeds from the life insurance policies in the names of their sons, both of whom lost their lives in battle, to help form the Jackson Community Foundation. They lived here, worked here, and raised their families here. They were visionary philanthropists committed to making a positive impact on our community for generations to come. The Carter Wickwire Society honors individuals like you who have demonstrated their commitment to our community by naming the Jackson Community Foundation in their estate plans.

**Why Choose the Jackson Community Foundation?** For over 75 years, the Jackson Community Foundation has created endowment funds to provide a sustainable source of funding to help build and strengthen our community, bringing together people and organizations that want to make a difference. You can trust that your gift will be here, for good, for ever. Start your family's legacy today by including JCF in your estate planning!

**Become a Member** today with your planned gift! There is no minimum gift amount and you may choose to remain anonymous. You may have already included JCF in your estate plan. If so, please let us know if you would like to be included on our Carter Wickwire Society membership list.

## Thank you Society Members! \*denotes individuals who fulfilled their bequest upon their death

Larry Anto\*  
Matthew D. &  
-Sharon A. Augustine  
Jody Bacon\*  
Mary Baird  
Jackie and Jerry Booth

Carole and John Briggs  
Lawrence L. Bullen\*  
John and Lisa Butterfield  
Mary Spaeth Steppon Demming\*  
Susan Diebold  
Georgia & Travis Fojtasek

Fred J. & Rachel B. Kulas\*  
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Mary Theresa Mills Family  
R. Dale Moretz  
Monica Moser & Steven Trosin

Chad Noble  
Hendrik Schuur  
Drs. James & Wendelyn Serino  
Richard Sigers  
Al Spiess, Jr.\*  
Sandra Svoboda  
Barbara Truax\*



# 2023 Financials

ASSETS		
FOR YEAR ENDING	12/31/2023	12/31/2022
Cash	\$380,825	\$521,280
Receivables	18,158	30,841
Prepaid Expenses	2,634	4,297
Total Current Assets	401,617	556,418
Investments	44,620,479	38,027,641
Furniture & Equipment, Net	37,889	48,331
Operating Lease	219,261	259,047
Beneficial Interest in Trust	4,288,068	3,054,522
<b>TOTAL ASSETS</b>	<b>\$49,567,314</b>	<b>\$41,945,959</b>
LIABILITIES AND NET ASSETS		
LIABILITIES		
Current Liabilities	\$85,311	\$69,060
Assets Held for Agency Funds	2,238,721	1,944,681
Operating Lease	183,670	223,217
<b>TOTAL LIABILITIES</b>	<b>2,507,702</b>	<b>2,236,958</b>
NET ASSETS		
Without Donor Restrictions	41,169,885	35,174,923
With Donor Restrictions	5,899,727	4,534,078
Total Net Assets	47,059,612	39,709,001
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$49,567,314</b>	<b>\$41,945,959</b>

ACTIVITIES		
FOR YEAR ENDING	12/31/2023	12/31/2022
Contributions	\$4,071,215	\$3,674,410
Net Investment Income	5,441,347	(6,290,779)
Change in Value Beneficial Interest	659,064	(865,155)
Other Support	47,950	51,040
<b>TOTAL REVENUES AND GAINS</b>	<b>\$10,219,579</b>	<b>\$(3,430,484)</b>
EXPENSES		
PROGRAM SERVICES		
Grants and Scholarships	\$2,094,867	\$2,018,556
Other Program Services	252,993	267,134
Total Program Services	2,347,860	2,285,690
Management and General	374,941	308,301
Fundraising	146,164	113,368
<b>TOTAL EXPENSES</b>	<b>2,868,965</b>	<b>2,707,359</b>
Change in Net Assets	7,350,611	(6,137,843)
Net Assets - Beginning of Year	39,709,001	45,846,844
<b>NET ASSETS - END OF YEAR</b>	<b>47,059,612</b>	<b>\$39,709,001</b>



The Moore Schropp Group

Thank you to our investment consultants at The Moore Schropp Group for helping to produce this publication!



*Confirmed in compliance  
with National Standards  
for U.S. Community  
Foundations.*

**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 CPAs and Business Consultants. An unqualified opinion of the Jackson Community Foundation was issued for 2022-2023. Please contact our office if you would like a copy of the audited financial statements, IRS Form 990 or any of the Foundation policies. You can also visit [www.jacksoncf.org](http://www.jacksoncf.org) to obtain this information.