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
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!

With a grateful heart, Monica Moser, President & CEO
We connect people & resources to causes that strengthen & build our community. 
For Jackson. For good. For ever.

**Our Mission**

**2023 at a Glance**

- **150 Volunteers**
- **358 Donors**
- **304 Funds**
- **12 New Funds**

$49,567,314 net assets

$2.15 MILLION in GRANTS

**Scholarships**

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

**ASSET UNDER Management**

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount</th>
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<tbody>
<tr>
<td>2016-25.2M</td>
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<tr>
<td>2018-27.1M</td>
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<tr>
<td>2020-33.2M</td>
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<tr>
<td>2023 - 45.0M</td>
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<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>10 yr</td>
<td>5.96%</td>
</tr>
<tr>
<td>7 yr</td>
<td>7.93%</td>
</tr>
<tr>
<td>5 yr</td>
<td>9.48%</td>
</tr>
<tr>
<td>3 yr</td>
<td>5.15%</td>
</tr>
<tr>
<td>1 yr</td>
<td>14.91%</td>
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</tbody>
</table>

**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
- Airo Steel
- Altech Doors
- Henry Alvarez
- Alvin L. Glick Foundation, Inc.
- Karen Alwine
- American 1 Credit Union
- American Title Company of Jackson
- Amy Annis
- Anonymous
- Derek and Amanda Anspaugh
- Josnelly Aponte
- Kurtis M. Ashley
- Dana and Glen Ashlock
- Jammie Bacon
- Beverly B. Baker
- Louise Baker
- Cynthia Barrus
- Battle Creek Community Foundation
- Jeffrey Beal
- Elaine Beck
- Stephanie Belcher
- Cindy and Rick Bellew
- Mary Benson
- Mr. and Mrs. Francis X. Berkemeier
- Bill and Anne Best
- Anne Birchmeier
- Mark Biskupski
- Denise and Dave Bjorklund
- Barb Blouin
- Karen Bollheimer
- Edie and Ken Bolton
- Bond & Company
- Marc Bonneau
- Mr. and Mrs. George F. Boone
- Dr. and Mrs. Jerry B. Booth
- Monica Bouman and Darrell Norris
- Mindy Bradish-Orta
- Marcia Bratschi
- Carole L. Briggs
- Jennifer Bruey
- Indrea Buckner
- Sally Bunce
- Angela Burzynski
- Ann Butler
- Kathryn Butler-Goodwin
- John and Lisa Butterfield
- Candy Calvert
- Jesse Carrajat
- Joyce Cauley
- Christine Chaparro
- Christine Chavez
- City of Jackson
- Kathleen and Susan Clark
- Shane and Andrea Clark
- Thomas L. and Jan L. Clark
- College and Career Access Center
- Robert Collier
- James and Chlorita Conner
- Consumers Energy Foundation
- Sandra S. Craft
- Brenda Crooks & Family
- Daniel Crowley
- John and Joan Cummings
- Denny and Sarah Dapra
- Doug and Karen Davey
- Mr. and Mrs. Frederick L. Davies
- George and Sara Davis
- Christina M. Dellas
- Joseph DeLombarde
- Delta Dental of Michigan
- Betty L. Desbiens
- David and Karen Desnoyer
- Russell Desy
- Bruce Deverman
- Susan L. Diebold
- Jane Dillon
- John and Sue Dixion
Connecting PEOPLE to CAUSES that matter - Thank you Donors!

Chuck and Jan Dominick
Thomas and Jeanne Draper
Martin DuBois
Robert & Barb Duke
Ruth Dukesbury
DWG Holdings LLC
Linda Eder
Dr. J. and Mrs. Susan Edurese
Embellishments Gallerie, Inc.
Erma E. Biedermann Student Scholarship
Fund of the Comerica Charitable Trust
Euchre Club
Andrew Faber
Jack Fairly
Shelly Farhat
Fetch Data, LLC
Ryan Fewins-Bliss
Jennifer Flick
Georgia and Travis Fojtasek
Fore Capital LLC
Gina Fortress
Scott and Michelle Fowler
Jeremy Frew
Eric and Kelly Froedtert
Martha A. Fuerstenau
Carol Atkins Gaddes
Kathryn Ganton
James Geisman
Bonnie Gettys
Edythe S. Gilbert
Brian and Carrie Glick
Bruce and Sue Goldsen
Cherie Good
GPGR Certified Public Accountants
Jamie and Lori Grace
Jim and Shirley Graves
Libby and Michael Greanya
Ann M. Green
Suzette Greep
Barb and John Griffin
David Grifflus
Thomas Gruel
Jennifer Haeger
Jim and Marsha Haehnle
Chris and Sam Hammond
Liz Hartley
Louise Hefka
Kelly and Don Hendershot
Henry Ford Jackson Hospital
Heather Herndon
Gregory Hoffman
Patricia Hoffman
Jamie Hoover
Dennis Hill
Marquita Hill
Monica Hill
Patrick and Elizabeth Hitchingham
Tony and Becky Hollow
Susan Holmes-Walker
Allan and Jo Ann Hooper
Jamie Hoover
Lauri Howard
Thomas Hunsdorfer
Hurst Foundation
Marge and Stan Idziak
Craig and Lynn Impey
Inosencio and Fisk, PLLC
Jack V. Butterfield Investment Co.
Jackson College
Jackson County Intermediate School District
Jackson County Medical Society
Willow Jeffreys
Richard and Mary Ann Johnson
Ronald and Marvel Jones
Brian and Theresa Jurasek
Wendy Kalahar
Daniel Kapp
Jeff and Phyllis Karmol
Kathryn Keersmaekers
Kelly Fuels, Inc.
David Kendall
Connecting **PEOPLE** to **CAUSES** that matter - **Thank you Donors!**

Nicholas Kennedy
Gary and Lynn Kenworthy
Dr. Paul S. Kenyon, MD
Courtland Keteyian
Dr. and Mrs. Lorenz Kielhorn
Kiwanis Club of Jackson MI
Joe and Sue Koziol
Gary and Jann Krupa
Makendra Krutsch
Martha Kuhn
Jerry and Diane LaFaive
Jon and Donna Lake
Jean LaMontagne
Joel Landenberger
Sandra Lane
Maria Lapinski-LaFaive
Tracy Ledford
Al and Jill Lefere
Janet Lehman
Honorable Carlene Walz Lefere
Pete and Nancy Lefere
Wayne and Karen Leja
Kathy Lincoln
Jackie Livesay
Martin and Karen Lozier
Frank and Angie Lusebrink
Frank Lusebrink Jr.

Erik Lyman
Zoey Lyons
Macchia Family Foundation
David Mahon
Cynthia Maino-Shue
Dennis and Kim Maino
Mark and Sandra Marcucci
Gregory Marsh
Sandra Marsh
Dennis Maurer
Susan Maxson
Jim and Sharon McCann
Doris McConkey
Laura McCully
Kevin and Lisa McDaniel
Danielle McGee
John and Catherine McLaughlin
Ronald E. Mealoy
Rebecca Mehall
Christine Melling
Meridian Wealth Management of Michigan
Michigan Works! Southeast
Jim and Brigid Miller
M. Lynn Miller
Sharon Miller
Gregory Million
Teri and Amy Miskowski

Ed Mitchell
Lora Mitchell
Mary Moburg
Dean Mohr
Margie Mohr
Phil and Karen Moilanen
Joel Moore
Phil and Yvonne Morgan
Valerie Stover Morse
Norman Morton
Carolyn Moser
Monica Moser and Steven Trosin
Shanna Munn
MVP Sports Store, Inc.
Myer and Lois Franklin Charitable Trust
Teresa Nagy
Karen Nelson
Mary Nixon
Nonprofit Network
Northwest Educational Foundation
David J. Ogle
Kevin and Michele Oxley
Norman and Patricia Paquin
Kari Pardoe
James A. Parker
Laurie Parker
Howard Patch
Connecting **PEOPLE** to **CAUSES** that matter - Thank you Donors!

Steven and Jill Patch  
Travis and Armida Pearse  
Don and Sue Peck  
Geraldine Phelps  
Monica Pierce  
Willye Pigott  
Connie Poisson  
Patti and Eric Poppe  
Jan Poupard  
Carolyn Pratt  
Marsha Prieskorn  
Charlene Pung  
Lynne Purcell  
Maritom K. Pyron  
R.W. Mercer Company  
Ralph C. Wilson Jr. Foundation Trustee  
-Designated Program  
Mary Raczkowski-Shannon  
Rehmann  
Raymond and Catherine Reynolds  
Brian and Sarah Richmond  
Dr. Cynthia A. Rider  
Leah Robin  
Martin Rollinger  
John Rosenbeck  
Susan Best Rowe  
Marge Rowley  
Mr. and Mrs. Robert K. Rozell  

Charlotte and Graham Sadler  
Mrs. Marceleine Sautter  
Patricia Schaub  
Cindy Schroeder  
Scott & Lynne Schropp  
Charles and Pamela Schultz  
Hendrik and Stephanie Schuur  
Nathan & Sarah Schuur  
Edward Scott  
Stacy Seay  
Jim and Jan Seitz  
Mark Shaw  
Amanda Sheffield  
Debbie and Jeff Shepard  
Richard Sigers  
Sandy and Fred Sill  
Cheryl Simonetti  
Allison Sleight  
Jodi Smalec  
Andrew J. Smith  
Beth Lawrie Smith  
Nancy and Roger Smith  
Smith Haughey Rice & Roegge  
Lauren Snyder  
Mark and Barbara Snyder  
Karen Spaan  
Mr. Carl F. Spaeth, III  

Nancy Sparks  
Speckhard-Knight Charitable Foundation  
Spring Arbor University  
St. James Lutheran Church  
Mary Jo Sutliff  
Jerry and Cathy Sykes  
Kevin and Stacy Sykes  
Don Tassie  
Linda Thayer  
The Brokerage House  
The Dawn Foods Foundation  
The Moore Schropp Group at Merrill  
The Natalie Field Foundation  
Three Griffins, Inc.  
Dr. and Mrs. V. S. Thyagarajan  
Tims Lake Preserve Condominium Association  
TKM Farms, Inc.  
Thomas A. Trosin  
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!

IN MEMORY

David Abbott
Dolores Abbott
Donald Abbott
Karen Abbott
Whitney C. Albertson
Jody C. Bacon
Dennis J. Beck
Felix and Eileen Best
Clark E. Bisbee
Amy Bonneau
Officer James D. Bonneau
Chris Brian
Jim Brian
Lauren Caster
Thomas I. Clark, Jr.
Dick Clifton
Terrance Herbert Conner
Dick Deredd

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

# 2023 Financials

## Assets

<table>
<thead>
<tr>
<th></th>
<th>12/31/2023</th>
<th>12/31/2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$380,825</td>
<td>$521,280</td>
</tr>
<tr>
<td>Receivables</td>
<td>18,158</td>
<td>30,841</td>
</tr>
<tr>
<td>Prepaid Expenses</td>
<td>2,634</td>
<td>4,297</td>
</tr>
<tr>
<td>Total Current Assets</td>
<td>401,617</td>
<td>556,418</td>
</tr>
<tr>
<td>Investments</td>
<td>44,620,479</td>
<td>38,027,641</td>
</tr>
<tr>
<td>Furniture &amp; Equipment, Net</td>
<td>37,889</td>
<td>48,331</td>
</tr>
<tr>
<td>Operating Lease</td>
<td>219,261</td>
<td>259,047</td>
</tr>
<tr>
<td>Beneficial Interest in Trust</td>
<td>4,288,068</td>
<td>3,054,522</td>
</tr>
<tr>
<td>Total Assets</td>
<td>$49,567,314</td>
<td>$41,945,959</td>
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## Liabilities

<table>
<thead>
<tr>
<th></th>
<th>12/31/2023</th>
<th>12/31/2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Liabilities</td>
<td>$85,311</td>
<td>$69,060</td>
</tr>
<tr>
<td>Assets Held for Agency Funds</td>
<td>2,238,721</td>
<td>1,944,681</td>
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<tr>
<td>Operating Lease</td>
<td>183,670</td>
<td>223,217</td>
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<tr>
<td>Total Liabilities</td>
<td>2,507,702</td>
<td>2,236,958</td>
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## Liabilities and Net Assets

### Liabilities

<table>
<thead>
<tr>
<th></th>
<th>12/31/2023</th>
<th>12/31/2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Without Donor Restrictions</td>
<td>41,169,885</td>
<td>35,174,923</td>
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<tr>
<td>With Donor Restrictions</td>
<td>5,899,727</td>
<td>4,534,078</td>
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<tr>
<td>Total Net Assets</td>
<td>47,059,612</td>
<td>39,709,001</td>
</tr>
</tbody>
</table>

## Total Liabilities and Net Assets

<table>
<thead>
<tr>
<th></th>
<th>12/31/2023</th>
<th>12/31/2022</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$49,567,314</td>
<td>$41,945,959</td>
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</tbody>
</table>

## Activities

### For Year Ending

<table>
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<tr>
<th></th>
<th>12/31/2023</th>
<th>12/31/2022</th>
</tr>
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<tbody>
<tr>
<td>Contributions</td>
<td>$4,071,215</td>
<td>$3,674,410</td>
</tr>
<tr>
<td>Net Investment Income</td>
<td>5,441,347</td>
<td>(6,290,779)</td>
</tr>
<tr>
<td>Change in Value Beneficial Interest</td>
<td>659,064</td>
<td>(865,155)</td>
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<tr>
<td>Other Support</td>
<td>47,950</td>
<td>51,040</td>
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<tr>
<td>Total Revenues and Gains</td>
<td>$10,219,579</td>
<td>$(3,430,484)</td>
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### Expenses

#### Program Services

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<th>12/31/2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants and Scholarships</td>
<td>$2,094,867</td>
<td>$2,018,556</td>
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<td>Other Program Services</td>
<td>252,993</td>
<td>267,134</td>
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<tr>
<td>Total Program Services</td>
<td>2,347,860</td>
<td>2,285,690</td>
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<tr>
<td>Management and General</td>
<td>374,941</td>
<td>308,301</td>
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<tr>
<td>Fundraising</td>
<td>146,164</td>
<td>113,368</td>
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<tr>
<td>Total Expenses</td>
<td>2,868,965</td>
<td>2,707,359</td>
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<tr>
<td>Change in Net Assets</td>
<td>7,350,611</td>
<td>(6,137,843)</td>
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<tr>
<td>Net Assets - Beginning of Year</td>
<td>39,709,001</td>
<td>45,846,844</td>
</tr>
<tr>
<td>Net Assets - End of Year</td>
<td>47,059,612</td>
<td>$39,709,001</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 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.

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