2021 Donor Acknowledgement and Financials

"The Community is Our Foundation"
Serving Jackson County, Michigan since 1948
Our Values:

- Act with **Integrity & Transparency**
- Embrace **Diversity & Inclusion**
- Advance **Equity**
- Inspire **Collaboration & Partnerships**

To learn more about our Values Defined and our Journey & Equity Statement, GO TO: [www.jacksoncf.org](http://www.jacksoncf.org)
2021 Highlights from the CEO

Because of you, the Jackson Community Foundation had the biggest asset growth EVER in 2021. Because of you, we were able to grant more than $1,700,000 to local nonprofits to implement important programs to help the people in our community now, to local organizations to implement changes to systems that have held inequities in place for generations, and to students on their journey to get a postsecondary degree or training. Because of you, we have been able to collaborate with other organizations to do all of this work together... because we know that we can’t do it alone. Nicole Kish and Janet Rochefort are great examples of this:

“I am a student in my first year of college after 21 years. My degree is an Associate of Arts with a focus on Public Administration and Management along with a certification in Behavioral Sciences. Although I am not positive what my end career path will be, I do know that I want my focus to be on humanities and how to provide and build positive experiences for women and young girls. I am currently working fulltime and I am a single mother to seven amazing children. By awarding me the Janet C. Rochefort Scholarship for Single Moms, you have helped lighten my financial burden which allows me to focus on my education. It is my hope that one day I will be able to give back to the community and help others achieve their goals as you have done for me.”

Pictured left: Nicole Kish and her children.

Because of you, we are humbled and thankful at the sheer power of your generosity to help us do more for people like Nicole. Because of you, we will be able to keep working For Jackson. For good. For ever.

With a Thankful Heart,
Monica Moser, President & CEO

To DONATE online, go to www.jacksoncf.org
Our Mission
We connect people and resources to causes that strengthen and build our community.
For Jackson. For good. For ever.

Scholarships
73 JCF Competitive Scholarships were awarded to 59 students totaling $143,050!

$45,846,844 net assets
$1.7 Million in grantmaking

2021 at a Glance

We make it easy to help! DONATE @ www.jacksoncf.org

The Youth Advisory Committee is a mini-foundation made up of 22 local students who review education & youth-related grant applications. Two students are elected, voting members of the Board. In 2021, YAC awarded 20 grants totaling $34,412!

Rate of Return

$273,000
Administrative Expense
- 12% of functional expense

Serving Jackson County since 1948
2021 Donor List... for choosing our community!

100(+) Women Who Care
2021 Ladies Legacy Golf Outing
AbbVie
Dr. and Mrs. Brian A. Adamczyk
Tonni Ogle Adamson
Addison P. Cook III Foundation
Ajax Heating & Air Conditioning
Alro Steel
Alvin L. Glick Foundation, Inc.
American 1 Credit Union
American Legion Riders Post 324
American Legion Rose City Post 324
American Legion Wilbur-Bartlett Post 315
American Postal Workers Union Local 273
American Title Company of Jackson
Linda K. Angell
Anonymous Donors
Josnelly Aponte
Kurtis M. Ashley
Karen S. Askins
John Bacon
Terese Bajorek
Beverly B. Baker
Louise Baker
Willy M. Baldwin
Carrie Barber
Cynthia Barrus
Judith Barry
Kaye Batdorff
Jeff Beal
Rick and Cindy Bellew
Stephen Berry
Best, Heyns, Schroeder & Best, P.C.
Bill and Anne Best
Billy White Roofing, LLC
Jim and Michelle Biondolillo
Dan and Karen Bishop
Mark Biskupski
Joe and Barb Blouin
Aaron and Courtney Boatin
Marilyn Egan-Bokor
Bond & Company
Nancy Bonneau
Mr. and Mrs. George F. Boone
Dr. and Mrs. Jerry B. Booth
Cherry Boris
Gwen Bradish
Janice Brady
Bras That Fit, LLC
Rhonella Brelinski
Carole L. Briggs
Terri Brooks
Grant and Anne Brown
Alex and Susan Brumer
Paul Buchholz
Indra Buckner
Lawrence Bullen
Jim and Susan Bullinger
Butterfield Development LLC
John and Lisa Butterfield
Candy Calvert
John and Erin Carr
Robert and Wendy Caster
Center for Family Health, Inc.
Christine Chaparro
Karenchaprnka
Chris Chong
Ted and Pam Christoff
Shane and Andrea Clark
Thomas L. and Jan L. Clark
Scott Clites
Lisa Coffey
College and Career Access Center
Consumers Energy Foundation
Janice Coratti
Council of Michigan Foundations
County National Bank
Mari T. Craft
Sandra S. Craft
Elaine Crosby
Joan Cummings
2021 Donor List... Thank you for choosing our community!

Kay Danby
Denny and Sarah Dapra
Myrna Davenport
Mr. and Mrs. Frederick L. Davies
George and Sara Davis
Dawn Food Products, Inc.
DBI Business Interiors
Christina M. Della
Monica Della
Betty L. Desbiens
David and Karen Desnoyer
Bruce E. and Ann Deverman
Todd and Heidi Devolder
Susan L. Diebold
Chuck and Jan Dominick
Thomas and Jeanne Draper
Martin DuBois
Scott and Michelle DuBois
Tobin and Abby Dunigan
Dean Dyer
Elayne Eberhart
Paul Eblen
Ronnie and Chloe Eblen
Tom Eblen
Mr. and Mrs. Carl English
Christopher and Sarah Ermatinger
Thomas and Nancy Evanson

Jack Fairly
Pamela Potter Falahee
Eileen Falk
Susan Fenker
Robert L. Fisher, Jr.
Trish Fletcher
Jennifer Flick
Georgia and Travis Fojtasek
Yvonne Foley
Scott and Michelle Fowler
James Franklin
Tim Franks
Jeremy Frew
Elizabeth Friedman
Eric and Kelly Froedtert
Jared Fryzel
Martha A. Fuerstenau
Lorenda Furman
Woody and Joyce Furman
James L. Geisman
Thomas Genise
Edythe S. Gilbert
Martha Giles
Brian and Carrie Glick
GPGR Certified Public Accountants
Jamie and Lori Grace
Jim and Joyce Grace

Granger Waste Services
Libby and Michael Greanya
Dr. and Mrs. Edward F. Greene
GreenStone Farm Credit Services
Richard Grimes
John and Susan Gruel
Thomas Gruel
Hadley Haas
Clara Haller
Thomas and Beverly Halsey
Susanne Hammond
Edward and Linda Hass
Shannon Henman
Henry Ford Allegiance Health
Bette Herndon
Bethany Hershia
Kip Hilbert
George and Nancy Hill
Phil and Roberta Hill
June Hinkle
David C. Hocker
Amy Hoeksema
Anna Mae Holland
Allan and Jo Ann Hooper
Hotchkiss Falahee Real Estate Group
Dana Howell
Sharon Hughes
Kenneth and Kim Huner
Inosencio and Fisk, PLLC
Becky Iocca
Jackson College
Jackson County Chamber of Commerce
Jackson County Intermediate School District
Jackson Interfaith Shelter
Jackson Pediatric Associates
Michael and Delores Jackson
Janet Johns
Willard H. Johnson
Ronald and Marvel Jones
Ronald June
Brian and Theresa Jurasek
Gary and Rebecca Kalahar
Patrick Kalahar
Jeff and Phyllis Karmol
Dan and Molly Kaser
Shelly Kasprzycki
Charles Keeling
Kathryn Keersmaekers
Patricia Kelley
Kelly Fuels, Inc.
Kendall Golf Academy LLC
Robert T. Kendall, III
Kennedy Group - Polly's Country Market
Gary and Lynn Kenworthy

Kibby Park Animal Hospital, PC
Rhhapsedy Kiley
Don and Dee Kilgore
Dale M. Kirk
Karen Kishpaugh
Kiwanis Club of Jackson MI
Kiwanis Foundation of Jackson
Matt and Natasha Koss
Joe and Sue Koziol
Leonard and Debora Krajewski
Charles and Jo Anne Krause
Krupa's Boat Mart
Bonnie Krupa
Gary and Jann Krupa
Makendra Krutsch
John and Jacque Kudner
Martha Kuhn
Jerry and Diane LaFaive
Maria, AJ and Quinn LaFaive
Alan Lairson
Jon and Donna Lake
Wayne and Kay Lambright
Joel Landenberger
Timothy Laning
Law Office of Philip M. Moilanen, P.C.
Honorable Carlene Walz Lefere
Pete and Nancy Lefere

Legacy Dry Cleaners
Eileen Lehnert
Libra Industries
Lifeways Community Mental Health
Kathleen Lincoln
William and Carole Loll
Anthony Lorenzi
Martin and Karen Lozier
Frank and Angie Lusebrink
Frank Lusebrink Jr.
Macchia Family Foundation
Tamyra Krupa MacFarlane
Jill Bacon Madden
David Mahon
Dennis and Kim Maino
Terry and Jan Maino
Debra Major
Jack Malone
Paula Manlove
Gregory Marsh
Dorothy Martinek
Roni Masquelier
Andrea Masters
Kyle Maurer
Susan Maxon
James and Sharon McCann
Leslie McIntosh
Sally McKinnon
Paul and Evie McNamara
Ronald E. Mealoy
Debra Melling
Ms. Jacqueline Menter
Kirk and Marty Mercer
Meridian Wealth Management of Michigan
Bob and Gloria Michaels
Michigan Automotive Compressor
Rick and Christy Mills
Ed Mitchell, PGA Golf Consultant
Dean Mohr
Phil and Karen Moilanen
Rod Monasmith
Victoria Moore
Terri L. Moran
Norman Morton
Carolyn and Andrew Moser
Monica Moser and Steven Trosin
Charles and Diane Moyer
Jacqueline Murray
MVP Sports Store, Inc.
Myer and Lois Franklin Charitable Trust
Myrna I. Berlet Trust
Teresa Nagy
National Instruments
Steven and Anne Noble
Northwest Dental Excellence PLLC
Northwest Educational Foundation
Sharon Novasel
Officer Collin Rose Memorial Foundation
David J. Ogle
Eric Oman
Paul Onweller
Oracle Financial Solutions, Ryan Parrott
Cindy O'Rourke
Ethed Otten
Kevin and Michele Oxley
Craig Pappin
Emily Spaeth Parker
John and Frances Parker
Peggy Parrott
Steven and Jill Patch
William Patterson
Travis and Armida Pearse
Don Peck
Deborah Peltier
Petty Machine & Tool Inc.
Geraldine Phelps
Joanna Poe
Connie Poisson
Patti and Eric Poppe
Pound and Pound Family Dentistry
Frank and Carolyn Pratt
Starlette Price
Pro Logo, LLC
Charlene Pung
Mary Ellen Ramker
Wallace Ramp
Dr. and Mrs. K. Vidyasagar Rao
Dennis Regan
Rehmann
Raymond and Catherine Reynolds
Dr. Cynthia A. Rider
Jean Ritsema
Cathryn Roberts
Kristen Rosas
Rotary Club of Jackson Michigan
Susan Best Rowe
David and Beth Russell
R.W. Mercer Company
Mrs. Marceleine Sautter
Steven Scarpino
Schaff Vision Care, LLC
Gloria Scheffler
William and Laura Schlecte
Susan Schneider
T. Mark and Sandra Schopmeyer
Scott & Lynne Schropp
Hendrik and Stephanie Schuur
Edward Scott
2021 Donor List... thank you for choosing our community!

James and Lisa Scott
Searles Family Foundation
Second District Association of American Legion Posts
Sandra Seguin
Jim and Jan Seitz
Drs. Jim and Wendy Serino
Seymour Ford Lincoln
Mary Raczkowski-Shannon
Amanda Sheffield
Tovah and Nicholas Sheldon
Mark Sherwood
Cynthia Maino-Shue
Barbara Sidlar
Sandy and Fred Sill
Jodi Smalec
Andrew J. Smith
Beth Lawrie-Smith
Rebecca Smith
Robert M. and Mary J. Smith
Sandi Smith
Mark Sokoll
Maria Sousa
South Central Credit Union
Carl F. Spaeth, III
Theodosia Spaeth
Susan and Steve Sparks
Speckhard-Knight Charitable Foundation
Tracy Spring
Janet Staples
Clara C. Stone
Anthony Sussex
Cathy Sykes
Don Tassie
Christine Taylor
Linda Thayer
The Erma E. Biederman Student Scholarship Fund
The Grace Group—Meridian Wealth Management of MI
The Moore Schropp Group at Merrill Lynch
The Powell Family
The Protection Center, Inc.
The Rotary Foundation of Jackson County
The Shop Rat Foundation, Inc.
Ann Thompson
Lynne Thompson
Three Griffins, Inc.
Al and Beth Thorrez
Dr. and Mrs. V. S. Thyagarajan
Mary Tomshack
Sheila Troxel and Karl Grieve
TRUE Community Credit Union
Mary Kathryn Trzeciak
US Drive Right
Vandercook Lake School Employees
Matthew VanderWerff
Dennis and Patti Vass
Mr. and Mrs. Pierre Verbeeken
VFW Post 10194 Grass Lake
Vietnam Veterans of America Chapter 109
David Voss
Max and Pamela Waagner
Susan Holmes-Walker
Mary M. Walz & Neil Johnston
Patrick and Suzanne Walz
Susan Walz and Jeffrey Goldberg
Kathy Warring
Ivan and Sharon Waterbury
Carol and Phil Waudby
Frank and Renell Weathers
Philip C. and Margaret A. Webb
William E. Wehrman III
Dennis Whedon
James White
Dennis and Marcia Whitehead
Jonathan and Melissa Tucker Williams
Robert Williams
James and Judith Wilson
Ronald and Barbara Winter
Stephen and Diane Wolcott
Joe and Judy Wolfe
Daryl and Warren Woodcock
Ken and Carol Woodhurst
Karen Worthy
Chuck and Sue Wrzesinski
Carol Zuchowski
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!

Matthew D. and Sharon A. Augustine
Mary Baird
Jackie and Jerry Booth
Carole and John Briggs
Lawrence L. Bullen
John and Lisa Butterfield
Susan Diebold
Georgia Fojtasek
Jim and Joyce Grace
Richard Allen Iverson
Mary Theresa Mills Family
R. Dale Moretz
Monica Moser and Steven Trosin
Chad Noble
Hendrik Schuur
Richard Sigers
Al Spiess, Jr.
Sandra Svoboda
Ric Walton
Carlene Walz Lefere

CARTER WICKWIRE SOCIETY….creating a legacy of philanthropy
## 2021 Financials

### ASSETS

<table>
<thead>
<tr>
<th>FOR YEAR ENDING</th>
<th>12/31/2021</th>
<th>12/31/2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$565,278</td>
<td>$254,205</td>
</tr>
<tr>
<td>Receivables</td>
<td>$301,864</td>
<td>$64,547</td>
</tr>
<tr>
<td>Prepaid Expenses</td>
<td>$6,075</td>
<td>$4,907</td>
</tr>
<tr>
<td><strong>Total Current Assets</strong></td>
<td>$873,037</td>
<td>$323,659</td>
</tr>
<tr>
<td>Investments</td>
<td>$43,375,390</td>
<td>$33,246,131</td>
</tr>
<tr>
<td>Furniture &amp; Equipment, Net</td>
<td>$52,219</td>
<td>$16,509</td>
</tr>
<tr>
<td>Beneficial Interest in Trust</td>
<td>$3,919,677</td>
<td>$3,063,463</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$48,220,323</strong></td>
<td><strong>$36,649,762</strong></td>
</tr>
</tbody>
</table>

### LIABILITIES AND NET ASSETS

<table>
<thead>
<tr>
<th>LIABILITIES</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Liabilities</td>
<td>$24,262</td>
<td>$67,266</td>
</tr>
<tr>
<td>Assets Held for Agency Funds</td>
<td>$2,349,217</td>
<td>$2,079,762</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES</strong></td>
<td><strong>$2,373,479</strong></td>
<td><strong>$2,147,028</strong></td>
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<table>
<thead>
<tr>
<th>NET ASSETS</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Without Donor Restrictions</td>
<td>$39,722,242</td>
<td>$29,745,286</td>
</tr>
<tr>
<td>With Donor Restrictions</td>
<td>$6,124,602</td>
<td>$4,757,448</td>
</tr>
<tr>
<td><strong>Total Net Assets</strong></td>
<td><strong>$45,846,844</strong></td>
<td><strong>$34,502,734</strong></td>
</tr>
</tbody>
</table>

| **TOTAL LIABILITIES AND NET ASSETS** | **$48,220,323** | **$36,649,762** |

### ACTIVITIES

<table>
<thead>
<tr>
<th>FOR YEAR ENDING</th>
<th>12/31/2021</th>
<th>12/31/2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$7,697,113</td>
<td>$3,050,563</td>
</tr>
<tr>
<td>Net Investment Income</td>
<td>$4,974,697</td>
<td>$3,250,037</td>
</tr>
<tr>
<td>Interest</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change in Value Beneficial Interest</td>
<td>$856,214</td>
<td>$222,574</td>
</tr>
<tr>
<td>Other Support</td>
<td>$60,935</td>
<td>$39,937</td>
</tr>
<tr>
<td><strong>TOTAL REVENUES AND GAINS</strong></td>
<td><strong>$13,588,959</strong></td>
<td><strong>$6,563,111</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PROGRAM SERVICES</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants and Scholarships</td>
<td>$1,673,704</td>
<td>$2,735,445</td>
</tr>
<tr>
<td>Other Program Services</td>
<td>$188,654</td>
<td>$172,534</td>
</tr>
<tr>
<td>Total Program Services</td>
<td>$1,862,358</td>
<td>$2,907,979</td>
</tr>
<tr>
<td>Management and General</td>
<td>$272,812</td>
<td>$257,991</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$109,679</td>
<td>$102,077</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td><strong>$2,244,849</strong></td>
<td><strong>$3,268,047</strong></td>
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</table>

<table>
<thead>
<tr>
<th>Change in Net Assets</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in Net Assets</td>
<td>$11,344,110</td>
<td>$3,295,064</td>
</tr>
<tr>
<td><strong>Net Assets - Beginning of Year</strong></td>
<td>$34,502,734</td>
<td>$31,207,670</td>
</tr>
</tbody>
</table>

| **NET ASSETS - END OF YEAR** | **$45,846,844** | **$34,502,734** |
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 2020-2021. 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 to obtain this information.