**Our 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

**Our Values Defined:**
- Act with Integrity & Transparency – We preserve the public trust through independent governance, objectivity, and honest leadership. We are open and forthright with one another, donors, grantees, and the community.
- Embrace Diversity & Inclusion – We lead by example and use our position in the community to promote greater understanding and use of diversity policies and practices. We practice and champion inclusiveness and honor diverse strengths, needs, voices, and backgrounds.
- Advance Equity – We advance equity by promoting policies and practices that eliminate disparities. Our work is to bring the wisdom of community to reimagine a society that works for all.
- Inspire Collaboration & Partnerships – We value the transformative power of collaboration and partnerships. By working together on mutual interests we create a more positive and lasting impact on our community.

To learn more about how we incorporate these values, go to www.jacksoncf.org to review our:
- Equity Statement
- Audited Financials and 990
- Grant and Scholarship reports
- And More!
I would like to start by letting you know that our community is stepping up during this unprecedented time of COVID-19 and working together to address the needs of our residents and nonprofits serving our most vulnerable. Many of our nonprofit organizations have pivoted and changed their priorities in 2020, and that includes your Jackson Community Foundation. Please visit our website at www.jacksoncf.org to keep updated on ways our community is responding to today’s most pressing needs or follow us on Facebook.

2019 was an amazing year for our Foundation. We are strong, especially with help…. YOUR help. We would like to thank you, as a supporter of the Jackson Community Foundation. We hope that as you review our 2019 Annual Donor Acknowledgement and Financials, you will get a glimpse of how our donors and endowment fund holders are continuing to make a difference in our community together.

Your investment in our community gives us a permanent instrument to make grants to causes that are important to us today and for future generations. We appreciate all of you for helping us continue to make a positive impact in the community you live in, work in, and have raised your children in. **For Jackson. For good. For ever.**

With a thankful heart,

[Signature]

President & CEO
2019 at a glance

$31,207,670 net assets - ending 2019

$278,000 Administrative Expense - 17% of functional expense

Assets Under Management 2013-2019

<table>
<thead>
<tr>
<th>Year</th>
<th>Assets Under Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>14.9M</td>
</tr>
<tr>
<td>2015</td>
<td>22.8M</td>
</tr>
<tr>
<td>2017</td>
<td>23.8M</td>
</tr>
<tr>
<td>2019</td>
<td>29.5M</td>
</tr>
</tbody>
</table>

Rate of Return:
- 10 yr 7%
- 7 yr 7%
- 5 yr 6%
- 3 yr 9%
- 1 yr 20%

What does this mean?
We meet standards for community foundations that are operationally and legally sound. Our operational effectiveness fosters excellence in philanthropy!

$1.1 Million in total grantmaking

- **$173,000** in education
- **$367,000** in arts, culture & recreation
- **$1,500** in environmental quality
- **$20,000** in economic prosperity
- **$391,000** in strong individuals & families
- **$25,000** in capacity building

Youth Advisory Committee
Our Youth Advisory Committee is a mini-foundation made up of 24 local students who review education and youth-related grants. Two of them serve on the JCF Board as voting members! In 2019, YAC awarded six grants totaling $9,400 for youth mental health, two grants totaling $6,000 for community impact needs and $850 in mini-grants to three schools.

Over 4.4 Million over 5 years!
Our Scholarships make a BIG impact! $32,000 in Legacy Scholarships were awarded to 32 Jackson County Students. $105,000 in Competitive Scholarships were awarded to 65 students! The average award was $1,200.

Our Mission:
“We connect people and resources to causes that strengthen and build our community. For Jackson. For good. For Ever.”
2019 Donors - Thank you for choosing our community

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Glen and Dana Ashlock  
Aspen Heating & Cooling, Inc.  
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Kathleen Austin  
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Michael and Valerie Stover Morse
Norman Morton
Carolyn Moser
Maureen Morgan
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D. Michael and Christina Tefft
Linda Thayer
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The Craft Agency
The Dawn Foods Foundation
The Erma E. Biedermann Student Scholarship Fund
The Fraternal Order of Police Jackson Lodge 70
The Weatherwax Foundation
Timothy and Sandra Thompson
Three Griffins, Inc.
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TKM Farms, Inc.
David and Mary Tolonen
Mary Tomshack
Allen Topa
Thomas A. Trosin
Shaun and Monique Turner
Newell and Suzette Turpel
United Way of Jackson County
US Drive Right
Jeanette Vaira
Phoebe VanHeyningen
Dennis and Patti Vass
Virginia Coney Island
Volunteers of Henry Ford - Allegiance Health
Voxai Solutions, Inc.
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Jay and Melissa Ziemba
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Janet K. Best Mitchell
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Don H. Nichols
Rosemary Noth
David J. Ogle II
Jeanne Ollhoff
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Dick Vanschoick
Patricia Worth
Greg Zeller
Karen Zimmerer

In Honor
Barbara Baird-Pauli
Janeen Cargill
Clients of Keyser Insurance Group
Jenn, Michael & Samantha Firmin
Georgia Fojtasek
The Jones Family
Monica Moser
Nancy Seydell
Mary Walz
Patrick and Suzanne Walz & Family
Susan Walz

What we do?
• Make giving easy for everyone
• Invest in long-term community solutions
• Build permanent endowment funds for Jackson County
• Provide community leadership

Carter-Wickwire Society
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
Jody Bacon
Mary Baird
Jackie and Jerry Booth
Carole Briggs
Lawrence L. Bullen
Georgia Fojtasek
Jim and Joyce Grace
Mr. Richard Allen Iverson
R. Dale Moretz
Monica Moser and -Steven Trosin
Chad Noble
Hendrik Schuur
Richard Sigers
Al Spiess, Jr.
Sandra Svoboda
Ric Walton
Carlene Walz Lefere
## 2019 Financials

### Assets

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<th>FOR YEAR ENDING</th>
<th>12/31/2019</th>
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<tr>
<td>Cash</td>
<td>$783,795</td>
<td>$489,903</td>
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<tr>
<td>Receivables</td>
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<td>$17,358</td>
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<td>Prepaid Expenses</td>
<td>$8,029</td>
<td>$15,648</td>
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<td>Total Current Assets</td>
<td>$795,898</td>
<td>$522,909</td>
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<td>Investments</td>
<td>$29,506,657</td>
<td>$24,651,552</td>
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<tr>
<td>Furniture &amp; Equipment, Net</td>
<td>$20,783</td>
<td>$18,293</td>
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<tr>
<td>Beneficial Interest in Trust</td>
<td>$2,840,889</td>
<td>$1,725,213</td>
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<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$33,164,227</strong></td>
<td><strong>$27,199,482</strong></td>
</tr>
</tbody>
</table>

### Liabilities and Net Assets

<table>
<thead>
<tr>
<th>LIABILITIES AND NET ASSETS</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIABILITIES</td>
</tr>
<tr>
<td>Current Liabilities</td>
</tr>
<tr>
<td>Assets Held for Agency Funds</td>
</tr>
<tr>
<td>TOTAL LIABILITIES</td>
</tr>
<tr>
<td>NET ASSETS</td>
</tr>
<tr>
<td>Without Donor Restrictions</td>
</tr>
<tr>
<td>With Donor Restrictions</td>
</tr>
<tr>
<td>Total Net Assets</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES AND NET ASSETS</strong></td>
</tr>
</tbody>
</table>

### Activities

<table>
<thead>
<tr>
<th>FOR YEAR ENDING</th>
<th>12/31/2019</th>
<th>12/31/2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>$1,869,295</td>
<td>$1,280,821</td>
</tr>
<tr>
<td>Net Investment Income (Loss)</td>
<td>$4,600,375</td>
<td>$(1,633,516)</td>
</tr>
<tr>
<td>Change in Value Beneficial Interest</td>
<td>$834,161</td>
<td>$88,255</td>
</tr>
<tr>
<td>Other Support</td>
<td>$102,181</td>
<td>$80,852</td>
</tr>
<tr>
<td><strong>TOTAL REVENUES AND GAINS (LOSSES)</strong></td>
<td><strong>$7,406,012</strong></td>
<td><strong>$183,588</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPENSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
</tr>
<tr>
<td>Grants and Scholarships</td>
</tr>
<tr>
<td>Other Program Services</td>
</tr>
<tr>
<td>Total Program Services</td>
</tr>
<tr>
<td>Management and General</td>
</tr>
<tr>
<td>Fundraising</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES</strong></td>
</tr>
<tr>
<td>Change in Net Assets</td>
</tr>
<tr>
<td>Net Assets - Beginning of Year</td>
</tr>
<tr>
<td><strong>NET ASSETS - END OF YEAR</strong></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, PLLC. An unqualified opinion of the Jackson Community Foundation was issued for 2018-2019. 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.