

ABOUT

Lakeshore Community Foundation offers the people of the Lakeshore Area an easy and effective way to support their favorite charities now and forever.

As a tax-exempt, public charity, the Foundation accepts a variety of gifts and designs charitable accounts for clients with a variety of philanthropic interests. Each client account has its own identity and charitable purpose. Each client account benefits from pooled investments to create a perpetual community resource. Each client account makes grants for purposes specified by its client. Over time, investment proceeds increase the value of each client account and the cumulative impact of its grants.

Although gifts and philanthropic interests may vary, the generosity and foresight of each client reflects an enthusiastic commitment to improve our communities now and for future generations.

BOARD OF DIRECTORS

Alex Allie

Thomas Aschenbrenner

Richard Balge

Thomas Bare

Pamela Langan

Randall Olm

Grant Pauly

Jane Pfeffer

James Vopat

CONTACT

Rachel Wiegert, CEO

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rwiegert@LakeshoreCommunityFoundation.org

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LAKESHORE COMMUNITY
F o u n d a t i o n

gather . grow . give

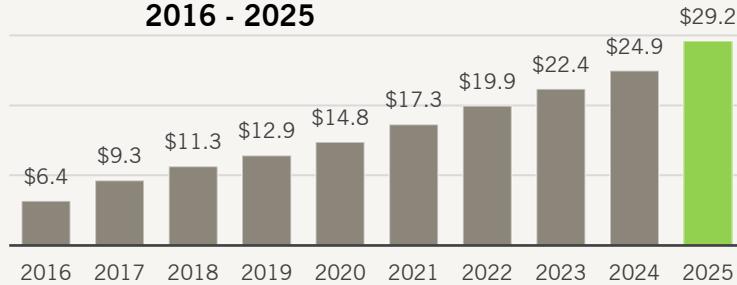
at a glance . . .

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www.LakeshoreCommunityFoundation.org

give

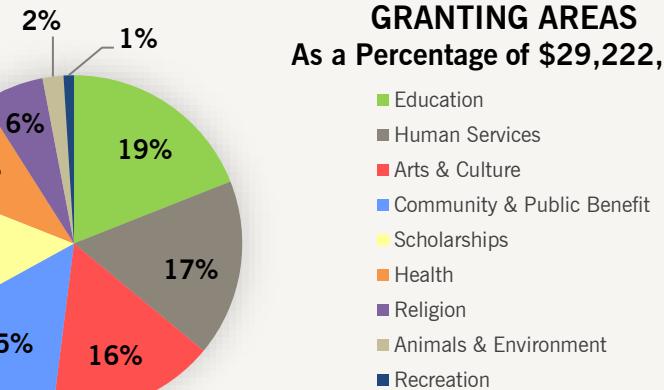
CUMULATIVE GRANTS

Endowed & Expendable Accounts
(in millions)
2016 - 2025



GRANTING AREAS

As a Percentage of \$29,222,000



grow

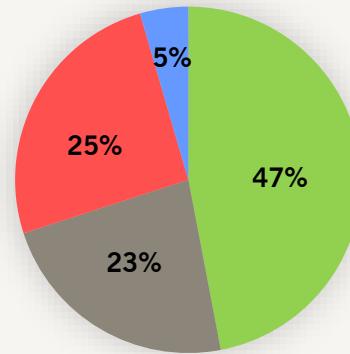
INVESTMENT PORTFOLIO PERFORMANCE

(Net Returns)
2016 - 2025: Average 9.55%



INVESTMENT PORTFOLIO

(Target Weighting)



gather

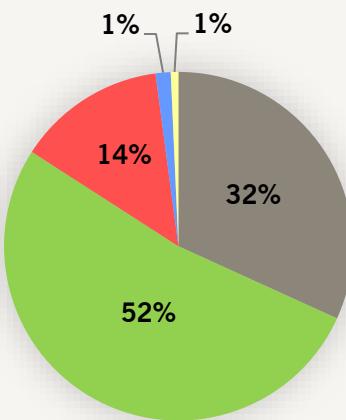
ASSETS UNDER MANAGEMENT

(in millions)
2016 - 2025



ACCOUNT CATEGORIES

As a Percentage of \$150,527,000



- **Agency (42 Accounts)**
Used to manage a nonprofit's endowment.
- **Donor-Advised (35 Accounts)**
Alternative to a private foundation.
- **Designated (23 Accounts)**
Client designates specific beneficiaries.
- **Field of Interest (9 Accounts)**
Client supports an area(s) of interest.
- **Unrestricted (2 Accounts)**
Client supports ever-changing opportunities.