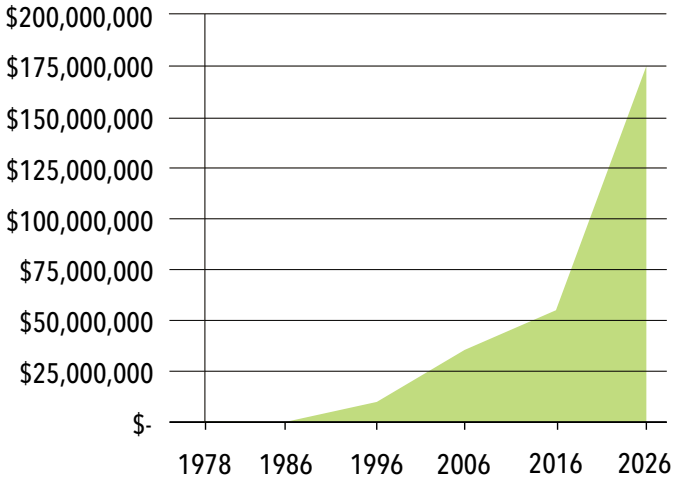
Financial Stewardship

GIVE GROW GRANT

At Wayne County Community Foundation, we are dedicated to nurturing and expanding the philanthropic resources that strengthen our community. By practicing prudent and responsible financial management, we ensure that we can address immediate needs while also securing and growing our assets for the future.

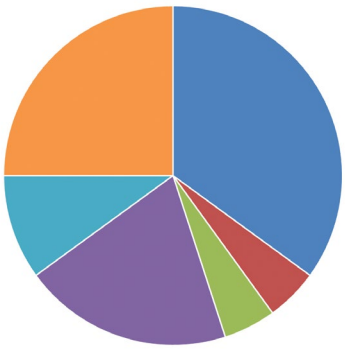
Our investment strategy is designed to safeguard and enhance the value of every donor's gift, building a solid foundation for long-term impact while meeting today's community needs. We achieve these goals through a carefully diversified investment portfolio, managed with expertise by both our investment committee and a seasoned professional investment management firm. Your generous support helps us make a lasting difference now and for generations to come.

Assets Since Inception



Asset Allocation

- U.S. Large Cap Equities 35%
- U.S. Mid Cap Equities. 5%
- U.S. Small Cap Equities 5%
- International Equities 20%
- Alternatives. 10%
- Fixed Income and Cash 25%



Investment Performance as of June 30, 2026

(net of all investment and banking fees)

YEAR	RETURN
1	15.3%
5	7.0%
10	8.4%

2025-2026 INVESTMENT COMMITTEE

Adam Briggs, Chair
Marlene Barkheimer
Mike Jarrett
Roger Proper
Brent Steiner
Ron Holtman, Emeritus

ACCOUNTING FIRM

Meaden & Moore Ltd.

AUDITOR

Rea & Associates, Inc.

INVESTMENT CONSULTANTS

Clearstead Advisors, LLC

CUSTODIAL MANAGERS

The Commercial & Savings Bank
Fidelity Investments

To view our Audited Financial Statements, scan the QR code or visit us online at **www.wccfoh.org.**