Findlay • Hancock County
The Community Foundation
Bridging Resources. Granting Opportunity.

Disclosure Statement

As of 11/1/25

Foundation Staff

Brian Treece, President & CEO
Kimberly Bash, Chief Community Engagement Officer
Richard Brown, Chief Financial Officer
Andrea Clements, Director of Scholarships, Affiliates, and Business Operations
Tasha Dimling, Director of Major and Planned Giving
Genna Freed, Communications Director
Rachel Gerber, Donor Engagement Officer
Lisa Houck, Finance and Communications Associate
Cindy Lahey, Administrative Assistant
Andrea Reinhart, Donor Relations and Stewardship Manager
Cassie Turner, Community Engagement Officer

The Family Center Staff

Sterling Helms, Director
Morgan Bernal, Administrative Coordinator

Foundation Board of Trustees

Kelly Shroll, Chair
Beverly Dowling, Treasurer
Alissa Preston, Secretary
Bill Conlisk
Frank Cosiano
Ginger Jones
Patty Lucas
Ed Reading
Christina Rodriguez
Rod Walton
Chris Ward

Finance and Investment Committee

Beverly Dowling, Chair
Lisa Amstutz
Bill Conlisk
Curt Cramer
John Haywood
Ginger Jones
Casey Klein
Garry Peiffer
Paul Sears
Brian Treece, ex-officio member
Richard Brown, ex-officio member

Investment Partner Program

The following organizations are a part of the Foundation's Investment Partner Program:

- Allen-Kramp Wealth Management
- Edward Jones (Findlay, Rich Rowe)
- Edward Jones (Fostoria, John Irwin)
- Hixon Zuercher Capital Management
- Merrill Lynch Wealth Management (Bonnoront-Mangiola-Edel Group)

Investment Managers

Fund Evaluation Group monitors investment performance of assets held by the following managers:

- Audax Group
- Champlain Investment Partners
- Charles Schwab
- Dimensional Fund Advisors
- Dodge & Cox
- EuroPacific (Capital Research)
- Falcon Strategic Partners
- Fidelity Investments
- Fund Evaluation Group Private Investors
- Key Private Bank
- Kohlberg Investments
- Oberweis Asset Management, Inc.
- PIMCO
- Principal Global Investors, LLC
- Strategic Value Partners
- Summit Partners
- The Trust Company Family Offices
- Vanguard Investments
- Weatherlow/Evanston Capital Management
- Yukon Capital Partner

Foundation Support Fees

For endowed funds, the fee is calculated based on the average market value of the fund for the twelve trailing quarters ending June 30 of the previous year. For non-endowed funds, the fee is calculated based on the average market value of the fund for the twelve trailing quarters ending December 31 of the previous year and assessed in January.

	Common Good	Field of Interest	Donor Advised	Designated	Agency	Scholarship
Endowed	1%	1%	1%	1%	0.75%	2%
Non-Endowed	--	--	1.25% ($500 min.)	1% ($250 min.)	0.75% ($250 min.)	--

Investment Fees

The funds of the Foundation share proportionately, based on market value, in investment fees.

Investment Policy Summary

Objectives

The overall, long-term investment goal of the Foundation is to achieve an annualized total return, through appreciation and income, that is greater than the rate of inflation (as measured by the broad, domestic Consumer Price Index) plus 5.5% (4.5% spending plus 1.0% support fee), thus protecting the assets against inflation.

Spending Policy

The Foundation’s spending policy determines the amount that will be available to grant from a fund. The Foundation’s current spending policy is 4.5% of the average of the twelve trailing quarter’s market value of a fund as of June 30.

Asset Allocation

The Foundation's current investment allocation adopted June 2024 is as follows:

ASSET CATEGORY	TARGET	RANGE	
		Min	Max
GLOBAL EQUITY	65%	40%	80%
Public Equities	60%	40%	75%
Domestic	48.5%	25%	60%
International Developed	11.5%	5%	30%
Emerging Markets	0%	0%	20%
Hedged Equity	0%	0%	10%
Private Equity	5%	0%	10%
GLOBAL FIXED INCOME/CREDIT	25%	10%	40%
Interest Rate Sensitive	10%	5%	40%
Credit Sensitive	15%	0%	20%
Liquid	10%	0%	20%
Private Debt	5%	0%	10%
REAL ASSETS	4%	0%	30%
Real Assets Multi-Strategy	4%	0%	15%
Real Estate	0%	0%	15%
Natural Resources	0%	0%	10%
Infrastructure	0%	0%	10%
DIVERSIFYING STRATEGIES	6%	0%	30%
Liquid Funds	0%	0%	20%
Hedge Funds	6%	0%	20%

Contact Us

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