



FOUNDATION FOR APPALACHIAN OHIO

Give. Grow. Create.

Disclosure Statement 07.6.2015

Foundation Staff

Caroline Boone, Foundation Associate
Cara Dingus Brook, President and CEO
Courtney Giffin, Accounting Clerk
Heather Keesee, Vice President, Programs and General Counsel
Amy Kettner, Director of Outreach
Tracy Mann, Data Manager
Phyllis Moody, Controller
Kelly Morman, Communications and Annual Fund Assistant
Maureen Sharkey, Executive Assistant and Liaison to the Board of Trustees
Holly Shelton, Vice President, Donor Services and Administration
Megan Wanczyk, Vice President, Communications and Annual Fund
Emily Webb, Community Philanthropy Assistant

Bill Courson, Chief Investment Officer (Part-time Consultant of Lancaster Pollard)
Dave Gruber, Chief Financial Officer (Part-time Consultant of DJG Financial Consulting)

Foundation Board of Directors

Ron Strickmaker, Chair – Athens County
Christiane Schmenk, Vice Chair – Franklin County
TJ Conger, Treasurer – Franklin/Jackson County
Ron Cremeans, Secretary – Washington County

Mike Brooks – Athens
Jeffery Chaddock – Franklin/Athens
Matt Elli – Muskingum

Terry P. Fleming – Franklin/Washington
Barbara Hansen – Muskingum
Belinda Jones – Franklin/Vinton
Mike Moore – Oklahoma
Alan Stockmeister – Jackson
David Wilhelm – Athens/Franklin

Emeritus Board Members

Marianne Campbell - Gallia
Robert “Mick” McLaughlin - Clermont Ronald Strickmaker – Athens

Audit Committee

TJ Conger, Chair
Matt Elli
Mick McLaughlin
Christiane Schmenk
Ron Strickmaker

Business and Finance Committee

TJ Conger, Chair
Mick McLaughlin
Christiane Schmenk
Ron Strickmaker

Executive Committee

Ron Strickmaker, Chair
Christiane Schmenk, Vice Chair
TJ Conger
Ron Creamens
Mick McLaughlin

Scholarship Committee

Jean Andrews
Marianne Campbell
Ray Chorey
Ryan Collins
Jeff and Jane Cox
Mike Davis
Henry and Pat Dillon
Jennifer Garrison
Joseph Ipacs
Myles Kiphen

Marsha Lewis
Kim Lovejoy
Carla Lowry
Carla Ryan-Hirst
Barb Shelton
Karen Stalder
Mary K Walsh
Lauren Worley
Dr. Rebecca Zurava
Cory Taylor
Jenni Dovyak-Lewis
Doug McCoard
Crystal Howard
Kathi Lynn
John Hoag
Ariana Ulloa-Olavarieta
Liz Pahl
Steve Rine
Jesse Branner
Van Henry
Heather Tarlton

Investment Managers

Edward Jones Financial Services JPMorgan Chase
Peoples Bank
Wells Fargo Advisors
WesBanco, Inc.

Fund Management Fee Schedule

(Fees are expressed as annual fees, assessed quarterly)

Donor Advised, Designated, Tier I Field of Interest, Geographic, Organizational
Endowment and Tier I Scholarship Funds: 1.5%

Tier II Field of Interest Funds and Tier II Scholarship Funds: 2.5%

Acorn Funds: \$200 annually

Pass-Through Funds (held or open less than 6 months): 10% of the
grants/distributions.

*****The Foundation for Appalachian Ohio does not provide financial benefit of
any sort to third-party participants in the gift planning process.**