

Designated Fund

Helping sustain and grow nonprofits

Establishing a designated fund allows you to support the good work of your favorite organizations. By giving through the Greater Milwaukee Foundation, your gift provides the organizations you select funding to sustain and grow.

HOW IT WORKS

- You identify an organization(s) that you wish to benefit. If you need assistance in identifying an organization(s), our expert staff can recommend organizations in your interest area.
- You make a gift to the Foundation during your lifetime or through a bequest in your will. You can give cash, appreciated stocks, real estate, or other assets.
- We set up a special fund in your name or in the name of your choosing. Or, if you prefer, you may remain anonymous.
- You receive tax benefits in the year your gift is made.
- We handle all the administrative details, including managing specific qualifications that you may establish for grant disbursements and issuing grant awards in the name of the fund you establish.
- Your gift—and all future earnings from your gift—will be a permanent source of community capital, helping to do good work forever.



Ten Reasons People Choose to Give through the Greater Milwaukee Foundation

One We are a *local organization* with deep roots in the community and beyond.

Two Our community investment staff has *broad expertise* regarding community issues and needs.

Three We provide highly *personalized services* tailored to each individual's charitable and financial interests.

Four Our funds help people *invest in the causes* they care about most.

Five We accept a wide *variety of assets*, and can facilitate even the most complex forms of giving.

Six We partner with *professional advisers* to create highly effective approaches to charitable giving.

Seven We offer *maximum tax advantage* for most gifts under federal law.

Eight We *multiply the impact* of gift dollars by pooling them with other gifts and grants.

Nine We build *endowment funds* that benefit the community forever and help create personal legacies.

Ten We are a *community leader*, convening agencies and coordinating resources to create positive change.



DONOR STORY: MAKING A DIFFERENCE*

Three times a week, Wendell Pittman delivers meals to homebound senior citizens as a volunteer for Meals for Seniors. Despite benefitting from volunteerism and a positive community reputation for more than a decade, the organization depended largely on small donations and lacked a predictable funding source. "Our organization needed more reliable funding, but we had trouble accepting large or complex gifts," says Mary Lynch, Meals for Seniors' executive director. After talking with Mary and with his financial adviser, Wendell decided to begin a designated fund with the Greater Milwaukee Foundation. He donated a piece of rental property that was becoming a bother in his retirement. The Foundation immediately sold the property and established the Wendell Pittman Fund. "We're thrilled to be working with the Foundation," says Mary. "Meals for Seniors would not have been able to do this on its own."

** This story represents a composite illustration drawn from actual donor stories of many of the people who give through the Foundation.*

The Greater Milwaukee Foundation

provides a simple, powerful, and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals. We welcome the opportunity to work with you and your adviser to fulfill your unique charitable objectives. For more information and ways to integrate charitable giving into your financial planning, contact the Philanthropic Services Department at 414-272-5805.