

Herbert J. Mueller Society

Recognizing professional advisers who make a difference

Professional advisers have always played an important role in the Greater Milwaukee Foundation's work — and in turn, made our community a stronger, healthier place. We are grateful for their partnership. As a way of saying thank you, the Foundation created the Herbert J. Mueller Society to recognize the hard work and generous spirit of those advisers who have partnered with the Foundation to help their clients create charitable legacies. The HJM Society also offers many benefits to advisers who are interested in deepening their knowledge of charitable-giving trends so they can provide the best and most up-to-date counsel to clients.

ABOUT OUR NAMESAKE

The HJM Society was named in memory of Herbert J. Mueller, an estate planning attorney who helped shape the Foundation into the organization it is today. Mueller worked with his clients to create gifts to the Foundation totaling nearly \$50 million. He also encouraged the Foundation to make important changes that enabled it to develop, grow and become a vital resource that continues to serve the greater Milwaukee area — and beyond — today.

Mueller brushed off any thanks for his efforts. But he took quiet and deep pride in the good he helped make possible. By encouraging others to build legacies, he created his own.

Like Mueller, members of the HJM Society are committed to their clients, philanthropy and the community. The Foundation is honored to call them partners and friends.

MEMBERSHIP QUALIFICATIONS

The HJM Society recognizes advisers who have made a recent client referral or pro bono effort (e.g. public speaking) on behalf of the Foundation, and its members include attorneys, CPAs, financial planners, brokers, insurance agents and other professional advisers. In thanks for their partnership, the Foundation offers these advisers several additional ways to enhance their client services.



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.

AS A MEMBER OF THE HJM SOCIETY, YOU'LL RECEIVE:

- Publications and e-newsletters that detail the latest charitable-giving trends and legislative issues facing charitable giving and estate/financial planning
- Invitations to Foundation events and seminars, including the HJM Society's annual adviser appreciation luncheon in the spring and a continuing education course for professional advisers in the fall (which counts toward continuing legal education credits)
- Opportunities to network with successful, community-engaged advisers from a variety of disciplines
- Membership in a LinkedIn group just for HJM Society members so you can stay connected and share information with other experienced advisers
- Recognition in the Foundation's annual report, website and other media

The Foundation is one of the oldest community foundations in the nation, with a century-old tradition of connecting donors with a wide range of worthy nonprofit organizations. More than 1,200 individual charitable funds — designated for causes of our donors' choosing — work together as a permanent endowment for our community, funding grants that serve people throughout Milwaukee, Waukesha, Ozaukee and Washington counties, and beyond. The Foundation prides itself on exceptional customer service and is a trusted resource for donors and their professional advisers.

To join the HJM Society, please contact our Philanthropic Services Department at 414.272.5805. Thank you for all you do for your clients and for our community.

We're a trusted resource

We work with advisers to enhance the services clients seek from you and your firm—always respecting and working within the relationships you have developed with your clients.

Why should you talk to your clients about charitable giving? Some advisers are reluctant to begin a charitable giving conversation with their client because they may be concerned about appearing to make a values judgment, especially if the client has not expressed charitable intentions. However, by not broaching the subject of charitable giving, a significant opportunity may be lost for your client and the community. In fact, many individuals expect to hear all options from their professional advisers and may not consider the opportunity of charitable giving if the subject is not raised.



Confirmed in compliance with National Standards
for U.S. Community Foundations