

# Ways to Give

We invite you to make a lasting investment in our community

The Greater Milwaukee Foundation features a variety of simple ways individuals, families, businesses, and nonprofit organizations can practice meaningful philanthropy within our community. The Foundation has a unique ability to accept a broad range of assets. Our staff is prepared and ready to assist you in determining which methods best meet your charitable goals. The Foundation is recognized by the IRS as a public charity, so donors are provided the maximum tax benefits allowed by law.

## GIVE NOW

**Outright gift:** You can make a gift of cash, stocks, bonds, real estate, or other assets to the Foundation. Your charitable gift qualifies for tax advantage under federal law.

**Charitable gift annuity:** You can make a gift of cash or property to the Foundation now, enjoy immediate tax benefits, and ensure that you or a loved one receives fixed quarterly or annual income payments for life.

**Charitable lead trust:** You can place cash, securities or property in a trust that pays a fixed amount to your fund at the Foundation for the number of years you designate. Once this period ends, the assets held by the trust are transferred to the beneficiaries you name. In some cases, you receive a substantial reduction in federal gift and estate taxes.

## GIVE LATER

**Bequest by will:** You can designate a portion or all of your estate to the Foundation and, in some cases, receive a substantial reduction in federal gift and estate taxes.

**Charitable remainder trust:** You can place cash, securities or property in a trust that pays annual income to you (or another named beneficiary) for life. After your death, the remainder of the trust transfers to the Foundation and is placed into a charitable fund you have selected. You receive income tax benefits the year you establish your trust.



## 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.



### GIVE LATER *CONTINUED*

**Beneficiary designation of retirement funds, IRA and life insurance:** You can make the Foundation a full or partial beneficiary of your life insurance policy or retirement account. It's an easy way to make a legacy gift without modifying your will. Upon your death, your gift is placed into a charitable fund of your choosing.

**Real estate:** You can make a gift of your home, farm, or vacation home and reduce your capital gains and income tax, while possibly receiving income for life.

**Transfer of a private foundation:** Donors who have a private foundation might consider transferring some or all of the assets to a donor advised fund at the Foundation. Terminating a private foundation and transferring it to the Foundation allows you to continue to be directly involved in making charitable gifts, but save on the time and costs involved in maintaining a private foundation.

### ENJOY PERSONALIZED SERVICE

Each individual, family, or organization we work with has unique charitable interests—and unique financial circumstances. We help you make the most of both, so you receive the greatest return on your community investment.

### 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.