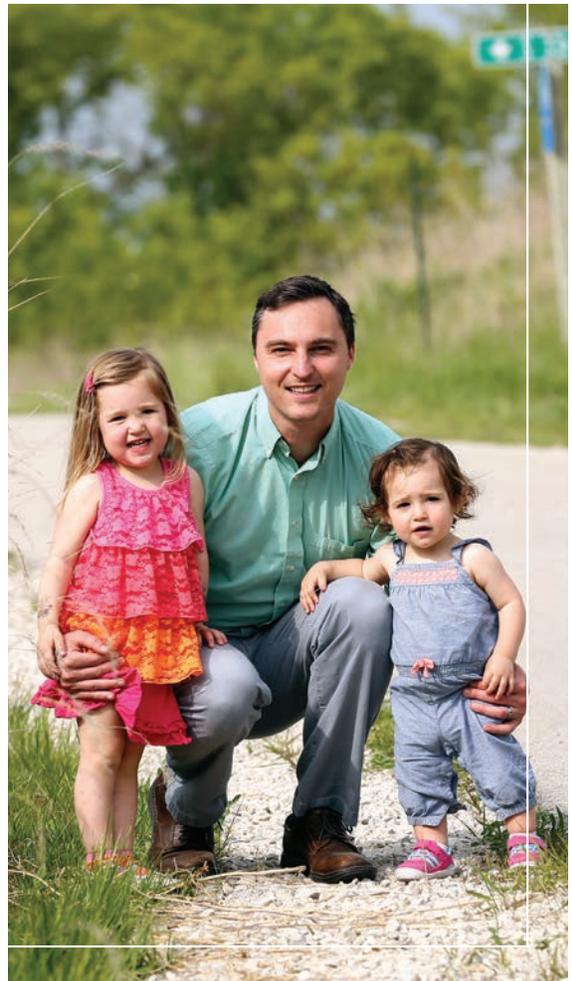




Welcome to the
Greater Milwaukee Foundation





Greater Together

As a philanthropist, you understand that generosity has the power to transform individual lives as well as the broader community. Partnering with the Greater Milwaukee Foundation for your philanthropy connects you to a tradition of giving that has enhanced the region and addressed critical needs for more than a century.

By leveraging the Foundation's expertise, experience and relationships, you will be able to maximize the impact of your giving wherever your passions lie. Join the Foundation's family of donors — working, learning and investing together with public, private and nonprofit partners — to experience philanthropy that is both personally rewarding and capable of accelerating next-generation ideas for a stronger region.

As you engage with the Foundation, you may discover how your generosity, especially when combined with the generosity of others, can create a powerful, immediate impact on our community, now and beyond your lifetime. ***Welcome!***

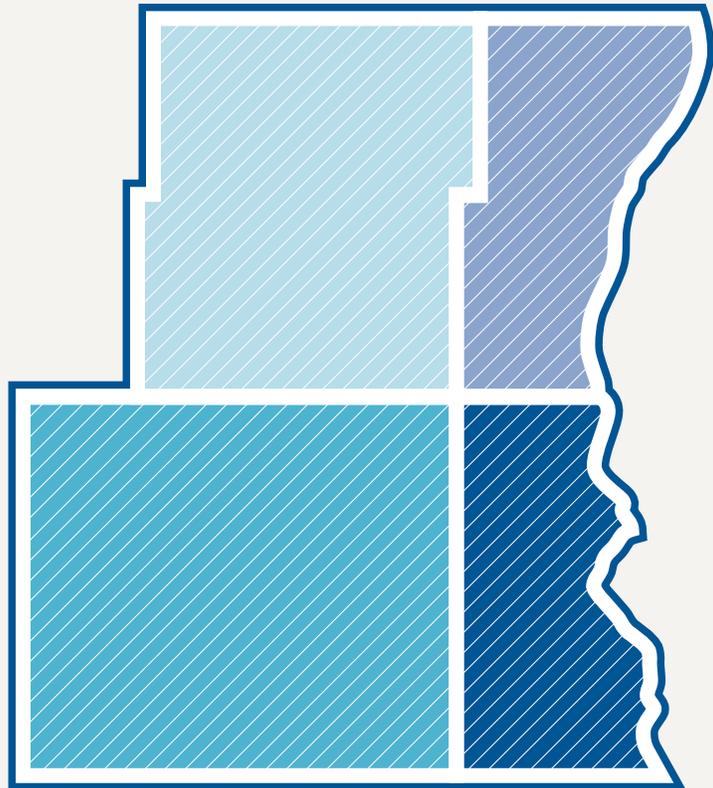


OUR COMMUNITY'S SHARED VISION

*Greater Milwaukee becomes a vibrant,
economically thriving region comprised
of welcoming and inclusive communities that
provide opportunity, prosperity and
a high quality of life for all.*

WASHINGTON
COUNTY

OZAUKEE
COUNTY



WAUKESHA
COUNTY

MILWAUKEE
COUNTY

ENDURING IMPACT

A woman with long blonde hair, wearing a grey hoodie with a teal accent, is lifting a young child into the air. The child is wearing a black hoodie and a blue t-shirt with a cartoon character, and is laughing joyfully. The background shows an outdoor event with an American flag and other people.

The Greater Milwaukee Foundation is the region's largest community foundation and was among the first established in the world. With a local focus, the Foundation connects generous people like you to community needs that align with your interests. While you maintain your own philanthropic legacy, the impact of your giving is amplified through the combined efforts of other thoughtful donors. All the while you are helping strengthen a permanent resource built to address the issues of tomorrow as well as today.

WHAT IS A COMMUNITY FOUNDATION?

A community foundation is an independent, tax-exempt organization supported by local philanthropists and dedicated to strengthening a specific community or region.

It is designed to manage and grow permanent, named funds established by many separate donors (including individuals, families, communities, nonprofits or corporations) to achieve their charitable goals. Investment earnings from these funds are distributed as grants to a wide range of programs and nonprofits, as specified by each donor. Over time, investment proceeds increase both the value of the endowments and the impact of the grants in the community. Community foundations serve the greater good, uniting knowledge and resources, funding research, providing leadership and advocacy on key issues, engaging partners across sectors and investing in solutions to ensure the community's social and economic vibrancy for generations to come.

Community foundations are vital partners in building communities where all residents are prosperous, healthy and secure.

LEADING INTO THE FUTURE

The Foundation has been a catalyst for positive change in greater Milwaukee for more than 100 years.

Together, the Foundation and many generous donors have addressed the most critical issues facing the community in each era of its history, and we remain uniquely positioned to do so in the future. The Foundation continues to accelerate progress in education, economic opportunity and security and neighborhood cohesion and vitality, along with a spectrum of emerging community priorities. It accomplishes this through broad and inclusive collaborations and partnerships with nonprofits, government and education systems; deep financial investment; and ongoing commitment to equitable policies, practices and outcomes.

PREMIER PARTNERSHIP

When you choose the Greater Milwaukee Foundation for your philanthropy, you are gaining a trusted partner that has served the community with integrity for generations. The Foundation's commitment to donor intent and extensive local knowledge plus its role as a convener and connector, all contribute to a sophisticated approach that informs, simplifies and enhances your giving.

Personal Philanthropy Made Easy

Give *Establish a fund in five easy steps:*

- ① Identify your giving passion and fund's purpose
- ② Choose a fund type
- ③ Determine a timeline for giving
- ④ Select an investment pool
- ⑤ Name your fund

Your signed gift agreement defines and safeguards your philanthropic goals, informing staff about how to honor your wishes now and in perpetuity.

Grow

Your fund's value will increase over time, as will the corresponding impact of your grantmaking on the community, due to the Foundation's professional investment oversight. You may add to your fund at any time.

Grant

Make grants from your fund to nonprofits locally, throughout the United States and beyond. Your philanthropic adviser will support you in achieving your philanthropic goals.



MICHAEL BARBER AND
JACKIE HERD-BARBER
Herd-Barber Family Fund



The Greater Milwaukee Foundation Difference:

Personalized Service

You can focus solely on the joy of giving while the Foundation's professional staff handles all of your charitable fund's paperwork and administrative details. Starting with your own philanthropic adviser, you'll work with real people who take the time to understand your values and interests while providing the advice and resources needed to ensure that you are achieving your philanthropic goals.

Community Knowledge

Rely on the Foundation's team of experts, which maintains in-depth knowledge of the community's needs and the nonprofit agencies most effective in meeting them. You'll also receive access to information about potential funding opportunities that align with your interest areas.

Professional Investment Management

You can expect very competitive investment returns, as our prudent investment philosophy allocates assets to maximize growth while limiting risk. With assistance from Colonial Consulting, a nationally renowned investment consulting firm specializing in large endowments, an investment committee of local financial experts oversees all of the Foundation's investments.

Enrichment and Access

Throughout the year, you'll be invited to attend a series of exclusive events and social gatherings that connect you to the region's top cultural, educational and business institutions while offering you an opportunity to learn about emerging topics. You'll interact with community leaders who are shaping the future of the region and working to address the community's pressing needs.

Expertise

The Foundation has a longstanding history of connecting generous people to community needs. It holds accreditation with the National Standards for U.S. Community Foundations®, the nation's highest standard for philanthropic excellence, which establishes legal, ethical and effective practices for community foundations.

GIVING YOUR WAY

Giving through a community foundation offers tremendous flexibility so that your charitable investment meets your needs as well as the community's. You can choose from the different fund types highlighted on the next page, depending on your goals and preferences.

HEIDI AND CHRIS CHLUPP
Legacy Society

Individual and Family Philanthropy

GIVE NOW

FUND TYPE	DESCRIPTION	BENEFITS
Greatest Needs & Opportunities	<i>You give the Foundation's board discretion over where grants are made.</i>	You trust the Foundation's history and knowledge about how to address the most pressing and changing needs within the community by adding to the Foundation's pooled grantmaking fund or by creating a named fund.
Field of Interest	<i>You support evolving community needs and a variety of nonprofits focused on your preferred area of interest.</i>	You select the interest area – such as education, arts and culture or racial equity and inclusion – and staff will reference its expertise and community knowledge to select effective nonprofits working in those areas.
Donor Advised	<i>You direct your grantmaking while tapping into Foundation expertise, resources and careful stewardship of your assets.</i>	You may use the fund as your primary philanthropic vehicle, recommending grants at your discretion and working with staff on funding opportunities. You may have the option to name successor generations as fund advisers under certain conditions.
Scholarship	<i>You help students pursue their educational dreams.</i>	You can specify an area of study, geographic area, academic or financial requirement, for example.
Designated	<i>You support your favorite nonprofits on an annual basis.</i>	You name the nonprofits in your gift agreement, and the Foundation distributes grants annually based on your fund's available grant dollars.

LEAVE A LEGACY

GIFT TYPE	DESCRIPTION	BENEFITS
Bequest	<i>You name the Foundation as a beneficiary of your estate plan or other assets.</i>	You create a lasting legacy to maximize tax benefits and impact our community for generations to come by supporting the greatest needs and opportunities of our region, specific interest area, or nonprofits you care about. Examples include naming the Foundation as a beneficiary in a will or revocable trust, or of an IRA or other retirement plan (401k, 403b).
Planned Giving	<i>You establish a planned gift to accomplish your personal financial and philanthropic goals.</i>	A wide variety of planned giving vehicles are available to meet your particular financial situation, including charitable remainder trusts, life insurance, charitable gift annuities or the remainder interest in real estate.

Organizational Philanthropy

FUND TYPE	DESCRIPTION	BENEFITS
Corporate Fund	<i>You establish a fund that offers your company a strategic giving program aligned with your business goals.</i>	You take a more proactive and strategic approach to philanthropy while simplifying the administration of giving and deepening employee engagement.
Agency Endowment	<i>You create a permanently endowed or quasi-endowed fund for your nonprofit that provides a quarterly distribution.</i>	You invest your agency's financial reserves with the Foundation and take advantage of our best-in-class investment managers and competitive investment returns while avoiding administrative overhead.
Partner Foundation	<i>Your group creates a 501(c) (3) entity affiliated with the Foundation with a separate governing board of directors.</i>	Your group or family can operate independently like a private foundation, maintaining its own board, while the Foundation handles all investment and administrative details, including related tax matters. Your board may choose one of the Foundation's investment pools or maintain a separate portfolio with an investment manager of its choice.

Collaborative Philanthropy

INVESTMENT	DESCRIPTION	BENEFITS
Coinvesting	<i>You partner with other donors to fund projects and programs carefully reviewed and vetted by staff.</i>	You amplify the impact of your philanthropy by uniting your grant dollars with those of the Foundation and other donors to support new projects or innovative programs focused on the region's greatest challenges.
Impact Investing	<i>You use your charitable assets to invest in economic vitality projects that can generate revenue that is then reinvested in additional projects to benefit the community.</i>	You use your charitable assets to invest in projects aimed at increasing our community's economic vitality. These revenue-generating investments flow back to the Foundation and are reinvested for future community projects.

FAITHFUL STEWARDSHIP

Once your fund is established, you can count on the Foundation to provide consistent communication, reliable counsel, sound fund administration and timely grant distribution, all in accordance with your goals and expectations.

JAMES A. SCHLEIF AND
WILLIAM H. MORLEY AND
BENSON THE WONDER DOG
Legacy Society



Built to Last

Meat-packing magnate Patrick Cudahy died nearly 100 years ago, but his generous spirit lives on through his Greater Milwaukee Foundation fund. He initiated the Foundation's first permanent fund in 1915 with gifts totaling \$75,000. Since then, it has generated more than \$425,000 for local children's causes, according to his wishes. At the same time, the fund's value, thanks to the Foundation's consistent investment strategy and careful stewardship, has climbed to more than \$448,000, ensuring an enduring impact for many generations to come. What will be the return on your generosity?

Thank you for your partnership, envisioning a greater Milwaukee where a high quality of life is realized by all.



Greater Milwaukee Foundation ☎ 414.272.5805
101 W. Pleasant St., Suite 210 ✉ info@greatermilwaukeefoundation.org
Milwaukee, WI 53212 🌐 greatermilwaukeefoundation.org

