

Unrestricted Fund

Meeting ever-changing
community needs

When you establish an unrestricted fund, your gift addresses a broad range of local needs—including future needs that often cannot be anticipated at the time your gift is made. We evaluate all aspects of community well-being: arts and culture, economic development, education, environment, health and human services, neighborhood revitalization, and more. The flexibility of your unrestricted gift enables the Greater Milwaukee Foundation's staff to respond to the community's most pressing needs—today and tomorrow.

HOW IT WORKS

- We set up a special fund in your name, in the name of your family or business, or in honor of any person or organization you choose.
- You receive tax benefits in the year your gift is made.
- Our expert staff determines the areas of community need that would be most impacted by grants from your gift.
- Our Board approves grants in the name of the fund you establish. If you prefer, you may remain anonymous.
- 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: A LASTING LEGACY*

Peggy and Ed Gibb always made giving to their community a personal priority. In meetings with their professional adviser, they began to consider including a bequest that would benefit their local community. "Peggy and I care a lot about this community," says Ed. "We wanted to give in a way that would continually help the people who live here." After considering their options, the Gibbs decided to establish an unrestricted fund with the Foundation. The Gibb Community Fund would take effect after they both pass away, leaving a portion of their estate to the Foundation. "By establishing an unrestricted fund, we were able to keep our gift from becoming outdated. Community needs change, so we wanted to make sure our gift wasn't too narrowly focused," says Peggy. "Because it's endowed at the Foundation, our gift will make a difference forever," Ed says. "It will grow over time and become an increasingly more valuable asset for our community. This is exactly the legacy Peggy and I want to leave."

MORE BENEFITS

Because you set no restrictions on the use of your gift, our experienced staff and Board are able to do what they do best—assess community needs and respond by awarding grants to the nonprofits that undertake our community's most critical work. Unrestricted funds help the Foundation to support long-term solutions; respond quickly to emergencies; and meet changing social, cultural, educational, or environmental needs in our local community. Grants are made in the name of the fund you establish, creating your personal legacy of giving. You may give your gift immediately or through your will or other estate planning strategy.

** 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.