Legacy Society

The gift that lives forever

You've worked hard to build your assets over the years. Now the question is: What is your dream for those assets after you're gone?

For many, the logical choice is to turn financial resources into a force for good, a charitable gift that will benefit our community for generations to come. The Greater Milwaukee Foundation's Legacy Society honors those generous individuals who include the Foundation in their estate plans so that we can carry out their philanthropic vision forever.

WHY GIVE A LEGACY GIFT?

It's an easy way to give back to the causes you care about most while allowing you to retain your assets during your lifetime so you can take care of family and friends first. After your death, the Foundation's expert staff will steward your philanthropic wishes in perpetuity. It's a wise investment in our community — your legacy gift will grow over time and do more good with each passing year.

WHAT ARE MY GIVING OPTIONS?

You can create your legacy through a variety of deferred gifts. Some can even provide a reliable source of income now and still fuel your charitable mission in the future. Options include:

- Bequest in a will or a revocable trust
- A beneficiary of an IRA and other retirement plans (401k or 403b)
- Charitable remainder trusts
- Life insurance
- Charitable gift annuities
- Remainder interest in a personal residence or farm

Some donors choose to give both now and in the future. Our Philanthropic Services team can work with you and your professional advisers to develop a customized plan that fulfills your legacy wishes.

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.

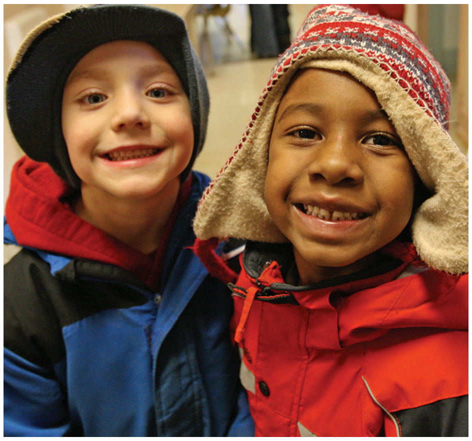
Six We partner with *professional advisers* to create highly effective approaches to charitable giving.

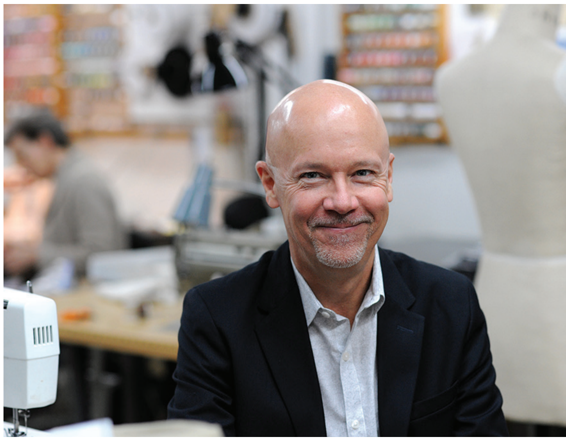
Seven We offer *maximum tax advantage* for most gifts under federal law.

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.





WHAT ARE THE BENEFITS OF THE LEGACY SOCIETY?

More than 400 donors have entrusted the Foundation with legacy gifts. The Foundation established the Legacy Society to recognize these individuals, offer them more opportunities to learn about our community and its greatest needs, and give them convenient access to the Foundation's programs, donor staff and services.

As a member of the Legacy Society, you'll receive:

- Recognition in Foundation publications and media (unless you prefer anonymity)
- Invitations to special Foundation events and celebrations
- Access to our expert staff for help with ongoing and future charitable giving
- Estate planning assistance and resources

I'VE ALREADY NAMED THE GREATER MILWAUKEE FOUNDATION IN MY ESTATE PLANS. WHAT'S NEXT?

First of all, thank you for your support and generosity. The next step is to inform the Foundation of your intent. Contact the Foundation and request a personal visit with one of our philanthropic advisers to discuss your specific intentions for your gift.

I'M INTERESTED IN NAMING THE GREATER MILWAUKEE FOUNDATION AS A CHARITABLE BENEFICIARY. WHAT'S MY NEXT STEP?

Request a personal visit with one of our philanthropic advisers to discuss options and next steps. We're happy to assist you and your advisers as you consider the various charitable options, and we can provide sample wording for your bequest.

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.

GREATER MILWAUKEE FOUNDATION

cf NATIONAL STANDARDS™

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