Professional Adviser Resources

Your partner in planned giving

Your clients look to you for knowledgeable and up-to-date tax and estate planning expertise. So when it comes to planned giving, the Greater Milwaukee Foundation can help by supporting your efforts and keeping you informed of the ever-changing rules of philanthropic giving.

Our knowledgeable gift planning team offers a variety of services, materials and opportunities that can help you cultivate deeper client relationships and provide the level of personal client services that your reputation was built on. Establishing charitable funds through the Foundation is simple and affordable and provides your clients with tax, estate and financial planning advantages.

HERE'S HOW TO BEGIN:

Planned Giving Design Center: The world's largest website for charitable gift planning, PGDC gives professional advisers all the news, historical resources and tools they need. Membership is free when you sign up at greatermilwaukeefoundation.org/PGDC.

Helping you help your clients:

- **Consultation:** We're here to answer your questions on the many charitable gift planning options available. Together, we can help your clients reach their unique giving goals.
- **Gift illustrations:** The Foundation can provide calculations that illustrate the financial outcomes of various charitable giving options.
- **Sample language:** You may download PDF versions of sample gift agreement language, which spell out the terms of a fund, at greatermilwaukeefoundation.org/advisers. To receive customizable gift agreement templates in Microsoft® Word, please contact us.

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.

STAY UP TO DATE:

- ***GiftLaw*:** Each week, this e-newsletter delivers legal updates, articles and a unique hypothetical charitable gift planning case. Sign up at www.greatermilwaukeefoundation.org/giftlaw.
- **Educational Seminars:** Expand your professional knowledge base by taking advantage of our periodic seminars featuring local and national experts and offering continuing education credits.

Networking Opportunities – Herbert J. Mueller Society
By referring clients or working on behalf of the Foundation, you will be invited to become a member of the HJM Society. The Society is our way of saying thank you and provides opportunities to network with other financial and estate planning professionals. Members are also listed on the Foundation website and in the annual report.

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.

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