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.

Professional advisers find themselves at the convergence point of two dramatic forces in society today: the enormous increase in personal wealth and the renewed concern for community. Regardless of economic fluctuations, the number of households with investable assets of $500,000 continues to rise and interest in charitable giving continues to grow.

At the same time, people from all economic backgrounds are giving back to community in record numbers. Community-based philanthropy is in the front ranks of this movement. In 2012, total annual gifts to community foundations increased to more than $5 billion—a 66 percent increase since 2002. (Giving USA 2013)

These trends are affecting professional adviser practices in two significant ways. First, advisers are incorporating charitable giving as an integral component of their financial and estate planning activities—including the question “Do you have charitable giving interests?” is standard planning practice for many advisers today. Charitable giving advice is a value-adding element in an adviser’s portfolio and a service welcomed by clients who expect an integrated approach to their wealth management. Second, advisers are incorporating community foundations as trusted resources in delivering charitable giving knowledge and products to their clients.

The Greater Milwaukee Foundation is a resource for advisers. Attorneys, CPAs, financial planners, brokers, insurance agents, and other professional advisers are turning to the Foundation to help enrich the charitable giving strategies of their clients.
HERE’S WHY

• The Foundation is an unbiased expert with technical information on a range of planned giving options—from executing gifts of real estate, stock, or personal property to establishing a donor advised fund or income-producing charitable annuities. The Foundation helps advisers provide their clients with the best charitable giving strategies based on each client’s unique financial situation, tax status, and giving goals.

• The Foundation has in-depth information on local, national and international needs and nonprofit organizations. When clients ask, “How can I make sure my charitable gifts will make a difference,” many advisers turn to the Foundation for information on programs and agencies that are working effectively in their areas of interest.

• The Foundation serves as the vehicle for giving many advisers seek for their clients. For example, the Foundation can establish donor advised funds—the very popular mechanism through which a client can make a charitable gift and stay personally involved in suggesting charitable uses for that gift over time. The Foundation is frequently named in bequests as stewards for estate assets that a client wishes to direct to address specific areas of community need in perpetuity. Giving through the Foundation also provides a client time and resources for evaluating potential grant recipients, as well as the ability to give to multiple charities with a single gift.