

## EIGHT REASONS TO START A CHARITABLE FUND



The Community Foundation of Southern Wisconsin helps manage a variety of charitable funds established by people with a passion for specific causes and their community. The experienced staff at the Foundation is ready to assist you and your professional advisor at any time to develop a personalized giving plan that best reflects the values, beliefs, needs and desires you seek in your charitable giving plan. For starters, here are eight wise reasons to start a charitable fund today:

### 1) Anyone can open one.

Whether you already give extensively or are just getting started, we can help you organize your charitable giving to support all of the charitable causes you care most about.

### 2) It's quick and easy.

Our professional staff will work with you to determine the fund type that best suits you and your goals. We will walk you through the simple process of opening your fund, and have it up and running within a few days. It can be as simple as including language in your will that says, "I give 10% of the net value of my estate to [stated charity]." Or giving from your IRA, or even your life insurance.

### 3) You can give to any charity you like.

Once you've opened your fund, you can begin recommending grants from it. Your fund can make grants to any 501(c)(3) organization in the U.S., including your high school or place of worship.

### 4) It's very affordable.

Most of our charitable funds are charged a nominal fund management fee. This low fee is used by the Community Foundation to support the work we do to improve the quality of life in our community. Plus, many of our funds offer great tax-benefits and can even be set up for you to continue receiving income from your gift.

### 5) It's flexible.

Organizing your giving through a charitable fund enables you to be strategic and intentional with your resources. You have the flexibility of contributing to your fund and then making grants over a period of time – on your schedule, not ours.

### 6) We do the work for you.

We can manage all aspects of your fund for you, including keeping track of your donations for tax purposes. And, if you know what kind of causes you want to support, but don't know where to give, we can help you with that, too.

### 7) Your giving information is kept private.

All funds at the Community Foundation, including grant-making activities and fund balances, are held in strict confidentiality.

### 8) It's much easier and less expensive than forming a private foundation.

People wishing to start their own private foundation certainly have great intentions, but the ongoing administration of a private foundation can be quite costly in both money and time. At the Community Foundation of Southern Wisconsin, we handle all of the administrative work, including asset management, marketing support, donor communication and updates, and more.

Call us today to start put your charitable dreams into action.

**608.758.0883 or 800-995-2379**