

## Should your client give through their community foundation?

Consider these three reasons.



We help people connect to the causes they care about most. When your clients make charitable gifts through The Community Foundation of Southern Wisconsin, they...

**Receive personalized service.** We work closely with you and your clients to develop a giving approach that matches their personal interests and tax-planning needs. We can help integrate charitable giving within estate and financial plans, establish Donor Advised Funds named for your clients, facilitate anonymous giving, and assist with even the most complex gift channels. In other words, we offer a highly personal approach to charitable giving.

**Gain local expertise.** Our professional staff monitors all areas of community need — including human services, education, the environment, healthcare, the arts, and economic development. We can help your clients learn more about local agencies and programs that make a difference in the areas they care about most. The Community Foundation of Southern Wisconsin helps individuals, families, businesses, and nonprofit agencies achieve their charitable and financial goals by providing tools and resources that make giving easy, flexible, and effective.

**Support community leadership.** We invest in the long term and bring people and organizations together, convening diverse voices to address local issues and opportunities. Our mission, Matching Personal Philanthropy with Community Need, is really about building and strengthening the very communities in which your clients grew up, live now, or just hold dear to their hearts.

We welcome the opportunity to work with you and your clients to create their personal philanthropic plan—one that provides your clients with the knowledge and benefits of tax advantages and helps them reach their giving goals. To partner with us regarding a potential gift, call us today.

### Gifts to last beyond a lifetime.

How can you help your clients realize their goal of contributing to the good of the community—now and beyond their lifetime? It's a challenge to know about all the charities clients might be interested in.

The Community Foundation has a long history of connections throughout the communities we serve. We are your local resource and the conduit to your clients' personal and meaningful giving intentions that allow them to

**LIVE GENEROUSLY.**

*For good. For ever.*

In Janesville (608)758-0883 / (800) 995-2379  
In Monroe (608) 328-4060 In Platteville (608) 778-3344

[WWW.CFSW.ORG](http://WWW.CFSW.ORG)



## How to approach a client about charitable giving.



Approaching charitable giving with your client can often be tricky. You want to help them maximize their giving potential and tax benefits without giving preference to a particular charitable organization. The Community Foundation of Southern Wisconsin can help you do just that in neutral, unbiased fashion. We can help you to establish a fund for your client, provide you with informative resources and even meet with you and your client to discuss their options as well as the benefits of charitable giving.

**Leaving a Legacy.** You are aware of significant tax advantages your client will achieve by including a charitable provision in his or her estate plan. Your client's bequest can create a fund that will contribute forever to causes that are personally important. We can help your client identify what he or she wants to accomplish and help you maximize the tax benefits of the bequest. In other words, giving with goals in mind.

**Retiring in Comfort.** CFSW can show you how charitable gift annuities or charitable remainder trusts can help your client achieve their goals for giving while also preparing well for retirement.

**Year-End Tax Planning.** Your client ends up with resources that have him/her wanting to invest back into the community but stumped on where to give. And it's nearly the end of the year. Did you know you can recommend establishing a Donor Advised Fund with us that will offer immediate tax benefits and allow your client more time to decide where to give?

**Gifts of Highly Appreciated Stock.** Your client has highly-appreciated stock and is willing to consider a charitable gift. He or she may realize a tax deduction for the full market value, while avoiding the capital gains tax that would otherwise arise from the sale of the stock. Closely-held stock can also be used as gift property.

**IRA/401K Assets.** The Community Foundation can help you and your client evaluate the most beneficial asset distribution to minimize taxes, thereby giving more to his or her heirs and still achieving significant charitable objectives. For example, it is usually more tax advantageous for a donor to give retirement assets to charity and other assets to heirs because income (and possibly estate) taxes often dilute the value of an IRA or other retirement asset left to an heir.

### Partners for Good

Attorneys, accountants, financial planners, and insurance agents partner with the Community Foundation of Southern Wisconsin to guide clients in the charitable giving process. Together we can help charitable individuals,

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