BENEFITS OF A COMMUNITY FOUNDATION

Whether you are an attorney, estate planner, accountant or financial advisor, you always have your clients' best interests at heart. So do we.

The Community Foundation of North Central Wisconsin works hand-in-hand with our local professional advisors to help their clients achieve their goals through philanthropy. Our experienced staff works with advisors to create giving strategies that are meaningful, tax-wise and effective for clients from all walks of life. As a behind-the-scenes philanthropic partner, we also handle all the administrative work so advisors can focus on building relationships and meeting the financial and charitable needs of their clients.

TEN REASONS TO PARTNER WITH YOUR COMMUNITY FOUNDATION:

1. We are a cost-free resource for charitable planning

From setting up affordable alternatives to private foundations to creating charitable instruments that provide a lifelong stream of income, we offer customized, tax-smart giving solutions to meet your clients' needs.

2. We are experts on North Central Wisconsin

Our in-depth knowledge of the region's issues and nonprofits enables us to provide personalized grantmaking assistance to your clients, if and when they need it.

3. We respect your roel as your clients' trusted advisor

We may be part of the conversation, but you will always remain in control of your client relationships. Our primary goal is to equip you with resources that can help you meet your clients' financial and philanthropic goals in a uniquely personal way.

4. We accept a wide range of gifts

From life insurance and highly appreciated stock to more complex gifts, we make giving easy and ensure your clients receive the maximum tax benefit

5. We offer unparalled service

We provide an array of concierge-level support services to your clients, including personal consultations with our staff and visits to local nonprofits – all at no cost. We also provide resources for advisors, from up-to-date information on charitable tax law to online giving tools.

6. We simplify your paperwork

We offer easy-to-understand fund agreements that can be tailored to your clients' unique wishes and situations. Funds can be started in as little as a day, and they may be named in a way that protects your clients' privacy or recognizes their family or business.

7. We connect you with other advisors

We offer educational opportunities and networking opportunities for our local advisors. Advisors can also join our quarterly newsletter, which highlights perspectives and experience to our work in the community.

8. We preserve your hard-earned relationships

Qualified investment managers who have been approved by our board have the opportunity to continue managing their clients' charitable assets. This also opens the door to building relationships with the next generation of your clients' families as they get involved in philanthropy.

9. We make your clients' giving go further

Our long-term investment strategies protect and grow your clients' charitable assets so they can support their favorite causes for years to come.

5. We are a community leader

We are a community leader, convening agencies, professionals, and coordinating resources to drive transformative change.