

PARTNERING GUIDE

Together, we can ensure clients achieve their financial and philanthropic goals.

When you refer a client to the Community Foundation of North Central Wisconsin, the process is collaborative and client-centered. The Community Foundation partners with you as the advisor to complement, not compete with, your work.

1 WHY REFER?

Referring clients to the Community Foundation strengthens relationships, expands your service offerings, and demonstrates your commitment to holistic planning.

Advisor benefits:

- Enhances **client satisfaction** and loyalty through deeper, values-based discussions.
- Expands your **professional expertise** in philanthropic planning.
- Offers opportunities for new **client referrals** and community connections.
- Provides access to **experienced philanthropic staff** for complex giving scenarios.

Client benefits:

- **Flexibility** in giving methods and timing.
- Significant **tax advantages** through charitable strategies.
- The ability to **make a lasting impact** on the causes they care about most.

2 HOW TO TALK ABOUT CHARITABLE GIVING?

Begin conversations about charitable giving by connecting financial goals to community impact. The key is to listen for values, passions, and moments of gratitude.

VALUES + COMMUNITY

- What do you appreciate most about living in Marathon County?
- Are there causes or organizations here that have special meaning to you?
- Is there something about this community you'd make better if you could?

LEGACY + FAMILY

- Have you thought about how you'd like to be remembered in the community?
- Would you like to involve your children or grandchildren in your charitable giving decisions?

FINANCIAL PLANNING

- Have you considered how charitable giving could align with your tax or estate planning objectives?
- Do you want to explore strategies to make a lasting impact while supporting your financial goals?

Looking for a good segway into the charitable giving conversation? You could try something like, "I often work with the Community Foundation of North Central Wisconsin to help clients simplify their giving while maximizing impact. Would you be interested in learning more about what that could look like for you?"

3 WHO AND WHEN TO REFER?

Advisors should consider referring clients who may benefit from structured, values-based charitable giving through the Community Foundation.

- Clients experiencing **major life transitions** such as retirement, sale or succession of a business, or receiving an inheritance.
- Individuals or families who express a **desire to give back** but do not yet have a clear charitable plan.
- High-net-worth clients seeking to **reduce tax liabilities** or manage significant assets strategically.
- Clients without heirs or those wishing to **leave a meaningful legacy** in their community.
- Families wishing to **engage younger generations** in philanthropy.
- Families who are **considering establishing a private foundation** and want to explore simpler, cost-effective alternatives such as a donor-advised fund.
- Families who wish to sunset or **transition out of an existing private foundation** but still want to continue their charitable legacy with less administrative burden.
- Clients engaged in estate or legacy planning, or those seeking **year-end tax strategies**.

4 WHAT HAPPENS WHEN YOU REFER?

Each referral begins with a confidential, values-based consultation between the client and Foundation staff. Your clients can expect their experience with the Community Foundation will include:

- **Personalized giving strategies** tailored to their financial goals and charitable interests.
- Access to **flexible giving options** such as donor-advised funds, endowments, and legacy gifts.
- **Professional investment** management and transparent reporting.
- Ongoing **stewardship** to ensure their charitable goals are met over time.

Thank you for partnering with the Community Foundation!

Connect us with your clients when appropriate, and let's build lasting impact in our community. If you have questions about the process or clients to refer, connect with the team.

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