



BEQUEST BY WILL

A personal legacy of giving.

Including a charitable bequest in your will is a simple way to make a lasting gift to your community. When you make this gift through your community foundation, we establish a special fund that benefits the community forever and becomes your personal legacy of giving.

BEQUEST BY WILL BENEFITS

Making a bequest to your community foundation is an easy way to transfer assets to charity. And, you can decide to do it at any age by adding to an existing will or drafting a new one. In doing so you leave a legacy to your community, while enjoying the assets you need to maintain your current lifestyle. Plus, you are able to distribute some or all of your assets, tax free.

You can give cash, appreciated stocks, or other assets. Some of the most tax-efficient asset types to give through your estate plan come from retirement plan accounts, since heirs would be taxed on the income in respect of the decedent (IRD).

Through your will, you can choose to give a stated dollar amount, a specific property, a percentage of your estate, the remainder after distributions to other beneficiaries, or you can make your gift contingent on certain events.

A PERSONAL LEGACY

Betty Gesche of Menomonie donated generously to many charities and organizations throughout her life. When she passed away in 2014, she left a bequest to start two funds at the Community Foundation.

The Betty Gesche Fund supports areas of greatest need in our county and the **Betty Gesche Fund for Menomonie Athletics** supports athletic programming in the Menomonie School District.

Betty's family noted, "She lived here her whole life and really loved this community and wanted to try to improve everything and anything she could."



LEAVE A LEGACY—Bequest by Will

Ten reasons people choose to give through community foundations

one

We are a **local organization** with deep roots in the community.

two

Our professional program staff has **broad expertise** regarding community issues and needs.

three

We provide highly **personalized** service 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 advisors** 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.

HOW IT WORKS

- You include the community foundation in your will as a bequest; we can help you or your attorney with recommended language.
- You determine the type of fund you would like to establish with your gift.
- Upon your death, we set up a special fund in your name, in the name of your family, or in honor of any person or organization you choose.
- Your charitable gift is excluded from your assets for estate tax purposes.
- Our professional program staff considers your charitable wishes and determines the areas of community need that would be most impacted by grants from your gift.
- Our board issues grants in the name of the fund you establish (if you prefer, grants can be made anonymously).
- We handle all the administrative details.
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift—and all future earnings from your gift—is a permanent source of community capital, helping to do good work forever.

OUR MISSION

We are a permanent savings and investment account for Dunn County. From this, we offer strategic grants to respond to local needs. This money grows from contributions from people just like you. We make it possible for anyone to create a legacy.

Our mission is to connect people who care with causes that matter to enrich the quality of life in Dunn County, now and for future generations.

For Good. Forever.