Why give to charity through an estate plan?
Planning an estate gift allows you to strategically accomplish both financial and charitable objectives. For many people, these include preserving the family name, honoring loved ones, providing for heirs, minimizing tax burdens and supporting the community they call home. Bequests to the Community Foundation are exempt from estate taxes.

Who can make a legacy gift?
Anyone with a desire to give back can make a legacy gift. Many people give assets including IRAs, securities, real estate, insurance benefits and cash. People are pleased to learn how easy it is to create a lasting legacy.

What good work can I do with my legacy gift?
Tell us what is important to you. You can enrich education, protect the environment, provide food, clothing and shelter to those in need, safeguard health and more.

Where can I do the most good?
That depends on what you want to accomplish. We are knowledgeable regarding local needs, critical programs and projects. We can help you craft a plan to support the causes you care about most in Marinette and Menominee Counties.

When should I include the gift in my estate plan?
Any time you are drafting or changing your will or estate plan, you may want to consider charitable legacy gifts. Your financial or legal advisor can provide professional guidance related to your specific estate, beneficiaries, income goals, taxes and other considerations. When you notify us of the gift, you are automatically eligible to become a member of our Standing Legacy Society.

How do I plan an estate gift?
Call your estate advisor, talk to us or consult with both. We provide confidential philanthropic services to prospective donors and their professional advisors, without pressure or obligation. Giving a legacy gift is simple:

• You include a bequest or planned gift to the Community Foundation in your estate plan and notify us.
• Upon your death, we establish a fund in the name you’ve chosen or your bequest contributes to an existing fund.