

It's Easy to Leave a Permanent Legacy of Support

Do you want to leave a permanent legacy of support for the causes and community you love? It's easy to do through planned giving. Here are answers to some of the most common questions we hear when people ask about creating their own legacy.

What is planned giving?

Planned giving is philanthropy combined with smart financial planning. It helps you make the most of your assets during your lifetime and helps you make future charitable gifts that are often much larger than you may have thought possible. Planned gifts use financial, estate and tax planning techniques that can lower your income and estate taxes, and reduce (or eliminate altogether) capital gains taxes.

Why choose Madison Community Foundation (MCF) as your partner?

MCF has nearly 80 years of experience helping individuals achieve their philanthropic goals and managing endowments to serve as permanent sources of charitable giving. As the steward of more than 1,200 unique funds, we are well positioned to assist you in developing a personal plan for giving through your estate. Together with your financial and legal advisors, we help you impact the charitable organizations you care about while making the most advantageous financial decisions for you and your family. Our services are free and easy to use; we are a flexible, cost-effective alternative to private foundations.

Who decides how my gift will be used?

You do. When you create a legacy plan with MCF, you outline how your future gift will be used to benefit the causes you care about most. Your gift can create or grow your named fund, and you may designate successors to advise your fund and recommend grants annually. You may also designate specific charities, field of interest funds or other existing funds at MCF to receive annual distributions from your fund.

Or, if you would prefer to take advantage of MCF's deep knowledge of the community to direct your grantmaking, you can make a gift to the Priority Fund, directed to address the community's most pressing priorities, or the Community Impact Fund, which supports MCF's grantmaking program.



"Investing some of our resources in the future of the community we love is very rewarding. Knowing that investment will continue into our children's and grandchildren's generations gives us a sense of purpose and meaning."

~ Bill Lunney and Judie Pfeifer

How much money do I need to give?

Donors can leave gifts of any amount. There is no minimum for gifts made as unrestricted or for existing funds such as your named fund, or MCF's Priority or Community Impact Funds. The minimum amount to establish a new endowed fund is \$15,000 for individuals and \$100,000 for a named field of interest fund.

How long will my named fund last?

Your personal legacy lasts forever. MCF endowments are carefully invested to achieve long-term growth and perpetual distributions to benefit causes and future generations.

How do I make a planned gift to MCF?

The simplest way to make a planned gift is to list Madison Community Foundation as a beneficiary of your retirement assets or life insurance policy. You may also leave a planned gift by including specific language in your will or trust, such as:

I/we bequeath to Madison Community Foundation (tax ID# 39-6038248), located in Madison, Wisconsin, _____ percent of my/our residual estate - OR - the sum of \$_____ to be used for charitable purposes set forth in a *Statement of Intent* or *Letter of Understanding* held by Madison Community Foundation.

Once you've arranged to make a planned gift to MCF – let us know! We will work with you to document specific ways you would like to make a difference through your gift and how you would like to be recognized. This information may be updated at any time without needing to revise your will. We will also invite you to join MCF's Legacy Society.

What is the Legacy Society?

The Legacy Society is a special group that acknowledges and honors individuals and couples who have made the meaningful decision to leave a gift to MCF in their will or estate plan. Member benefits include invitations to special programs and events, acknowledgment in our annual report and other publications, and more. Donors may also choose to remain anonymous.

How do I receive more information?

To learn more about leaving a legacy through MCF, please contact our Donor Engagement Team:

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