

# You Can Give to MCF in a Variety of Ways

Giving to Madison Community Foundation is easy, and you can use a variety of assets to do so. You can direct your gifts to your own fund, a nonprofit organization's endowment fund or to a fund that is advised by MCF's Board and staff, such as the Community Impact Fund.

## Cash

MCF can accept gifts made using checks, credit cards or through an electronic funds transfer (EFT).

- **Checks.** Make checks payable to Madison Community Foundation and be sure to include the name of the fund to which you're contributing in the memo field. Checks should be mailed to our office at 111 N. Fairchild Street, Suite 260; Madison, WI 53703.
- **Credit cards.** Make a gift using your credit card at [madisongives.org/givetoMCF](https://madisongives.org/givetoMCF). Your gift amount will be reduced by the merchant processing fees for credit card transactions, which are approximately 4%.
- **EFTs.** Set up an automatic monthly gift from a checking or savings account. You can find the EFT form at [madisongives.org](https://madisongives.org) under the *Ways to Give/Cash* section, or call our office and we will send you a form to fill out.

## Securities

Giving appreciated stock and mutual fund shares offers a charitable deduction for the current full fair market value of the donated assets. You do not have to pay capital gains tax on donated securities. Please call our office before donating shares of publicly traded stock or mutual funds to initiate the transfer and prepare MCF to accept the gift.

MCF may accept gifts of closely held stock on a case-by-case basis. Call us to learn more.

## Life Insurance

Life insurance is one of the easiest ways to leave a legacy. You can assign your insurance policy to MCF as the beneficiary and continue to make annual, tax-deductible contributions to cover the premium.

When making your beneficiary designation, use the following:

Legal Name: Madison Community Foundation  
Tax ID: 39-6038248

## Retirement Accounts

Naming MCF as the beneficiary of your IRA, 401(k) or 403(b) is a tax-efficient alternative to gifting these assets to family members. Completing a Legacy Gift Statement of Intent, which can be downloaded at [madisongives.org](https://madisongives.org) under the *Ways to Give/Retirement Plan Beneficiary Designation* section, allows you to designate where you would like the assets to go.

When making your beneficiary designation, use the following:

Legal Name: Madison Community Foundation  
Tax ID: 39-6038248

## Charitable Gift Annuity

A charitable gift annuity (CGA) allows you to make a tax-deductible gift today and receive guaranteed income for your lifetime or, with a joint annuity, over your lifetime and the lifetime of another. When you establish the CGA, you can choose to begin taking annuity payments immediately, or defer them until a later date. The remainder of the CGA is used to benefit an endowment of the donor's choice.

## Estate Plan

Naming MCF as a beneficiary in your will allows you to leave a legacy of support for your charitable interests while retaining complete control of your assets during your lifetime. You can make a bequest of a specific dollar amount, a percentage of your estate or the remainder of your estate after other bequests are fulfilled.

When making your beneficiary designation, use the following:

Legal Name: Madison Community Foundation  
Tax ID: 39-6038248

## Real Estate

MCF will consider gifts of real estate after completing proper due diligence. We will work with you and your advisor to assess the feasibility of any gift you are considering, now or through your estate plan.

MCF will consider real estate that has a reasonable expectation of being sold within a year, and does not jeopardize MCF's nonprofit status or expose it to liabilities. A gift of real estate you have owned for more than one year may entitle you to a tax deduction for the full fair market value of the property while allowing you to avoid capital gains taxes.

## Questions About Gift Options?

If you have questions about gift options, please contact David Koehler, Vice President of Donor Engagement, at 608-232-1763 or by email at [dkoehler@madisongives.org](mailto:dkoehler@madisongives.org).

*MCF may accept gifts of other tangible property on a case-by-case basis.*