



COMMUNITY
FOUNDATION
OF SOUTHERN WISCONSIN



PROFESSIONAL ADVISORS HANDBOOK

*A QUICK RESOURCE GUIDE TO HELP
YOUR CLIENTS WITH CHARITABLE GIVING*

OUR SHARED VISION

The lives of all people in the communities we serve will be touched by the Community Foundation.

OUR MISSION

We match personal philanthropy with community needs.

We will be there. For *good*. For *ever*.

OUR GUIDING PRINCIPLES AND CORE VALUES

WE BELIEVE:

- All citizens of Southern Wisconsin deserve a respected, trustworthy, and approachable steward of their charitable funds.
- The Community Foundation serves as a catalyst for improving the quality of life in our region.
- Our work will foster inclusivity.
- In promoting open dialog, creating strategic alliances, and sharing of knowledge.
- In action with integrity and accountability to our communities.
- In offering opportunities for empowering donors and grant recipients.

INTRODUCTION

The Community Foundation of Southern Wisconsin invites attorneys, estate planners, accountants, insurance professionals, trust officers, and consultants in the financial service sector to use this guide to assist their clients in considering the intrinsic values of charitable gifts, their material advantages, and the intangible benefits to donors and their successive generations.

Beyond the information made available here, the Community Foundation offers itself as a free professional resource to advisors and their clients. We will work with you to answer questions, resolve concerns, and design funds that positively address your clients' community and philanthropic interests.

We are excellent stewards of the resources given to us by donors to benefit the community. We are not the ultimate beneficiaries of any gifts that we receive. The true beneficiaries are the residents of our communities who will enjoy improvements to their lives because generous donors made gifts to their community through the Community Foundation of Southern Wisconsin. We take our stewardship responsibility very seriously, and we are ready, in fact eager, to discuss our stewardship of the resources entrusted to us as we carry out our mission.

Your inquiries are always kept confidential, just as our anonymous donors' identities are protected. Please call (608) 758-0883 or send e-mail correspondence to info@cfsw.org.

PART ONE: OVERVIEW

LEGAL STANDING

The Community Foundation of Southern Wisconsin, Inc. (CFSW) is a public charity incorporated under the laws of the State of Wisconsin and tax exempt under Section 501(c)(3) of the Internal Revenue Code.

FINANCIAL STANDING

Since 1992, assets to benefit Southern Wisconsin have grown to more than \$33 million.

SERVICE AREA

The CFSW serves the nine counties of Crawford, Grant, Green, Iowa, Lafayette, Rock, Sauk, Vernon, and Walworth through 16 Community Funds and more than 530 other funds established to match personal philanthropy with community need.

Any individual or entity may establish a fund through the Community Foundation. Although residents and non-profit organizations in Southern Wisconsin are our primary concern, funds may be established to benefit charitable organizations anywhere in the United States, and, in certain circumstances, anywhere in the world.

GOVERNANCE

Founded in 1992, the Community Foundation is governed by a 15-member volunteer board of directors from across the service area. Each year more than 200 additional volunteers serve on a variety of advisory boards, committees, and task forces.

SERVICE TO COMMUNITY

The Foundation's competitive community Grants program awards funds to non-profit, 501(c)(3) organizations in Southern Wisconsin.

Designated or Donor Advised Funds in the Community Foundation may support local, regional, national, or international organizations.

The Community Foundation's 170 scholarship funds benefit hundreds of students in the Southern Wisconsin region each year.

Since 1992, funds held by the Community Foundation have made more than \$32 million in grant and scholarship awards.

We enthusiastically welcome opportunities to collaborate with individuals or organizations to improve the quality of life in Southern Wisconsin.

CFSW SERVICE AREA:

- CRAWFORD COUNTY
- GRANT COUNTY
- GREEN COUNTY
- IOWA COUNTY
- LAFAYETTE COUNTY
- ROCK COUNTY
- SAUK COUNTY
- VERNON COUNTY
- WALWORTH COUNTY

CONTACT INFORMATION

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Please visit our website at **www.cfsw.org**. You will find a wealth of information there.
Or stop by and visit us. We'd love to see you and to talk with you about what we do.

JANESVILLE OFFICE

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Barb Daus

Donor Services Representative,
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*There is nothing we like better than working with you and your client to make
Southern Wisconsin a better place to live, work, and play.*