

# Field of Interest Fund

Connecting personal values to high-impact opportunities

By establishing a field of interest fund, you can target your gift to address needs in an important area of community life such as arts and culture, economic development, education, environment, health and human services, neighborhood revitalization and more. Our Board awards grants to community organizations and programs that are making a difference in the area you select. Your gift stays flexible enough to meet community needs in your interest area—even as they change over time.

## HOW IT WORKS

- You identify an area of personal interest as broad or narrow as you wish.
- You make a gift to the Greater Milwaukee Foundation during your lifetime or through a bequest in your will. You can give cash, appreciated stocks, real estate, or other assets.
- We set up a special fund in your name, in the name of your family or business, or in honor of any person or organization you choose.
- You receive tax benefits in the year your gift is made.
- Our expert staff evaluates needs in your area of interest that would be most impacted by grants from your gift.
- We handle all the administrative details including issuing grants to nonprofits in the name of the fund you establish. If you prefer, grants can be made anonymously.
- Your gift—and all future earnings from your gift—will be a permanent source of community capital, helping to do good work forever.



## Ten Reasons People Choose to Give through the Greater Milwaukee Foundation

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

**Two** Our community investment staff has *broad expertise* regarding community issues and needs.

**Three** We provide highly *personalized services* 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 advisers* 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.



### DONOR STORY: HONORING A LOVED ONE\*

When they lost their adult daughter, Susan, to cancer, the Perez family received hundreds of contributions from people throughout the community. Susan had been a high school teacher, so many of the contributions came from fellow teachers and from parents of the students whose lives she had touched. "Susan cared so deeply about her work," says Mrs. Perez, "and we wanted to use the money to continue in that spirit of helping children through their education." The Perez family spoke with the Foundation and decided to establish the Susan L. Perez Education Fund, a field of interest fund that memorializes their daughter by supporting local educators and students. "We chose to begin this kind of fund because education is so dynamic," says Mr. Perez. "We realize that we aren't always aware of what our school system needs and how it works, and we wanted to be sure that, even years from now, grants made in Susan's name make sense for our community."

### MORE BENEFITS

While you direct the field of interest fund you establish from its creation, the maintenance is left up to us. Our knowledgeable staff continually monitors changing community needs so that you can be sure grants made in the name of the fund make the most impact in your field of interest and create your personal legacy of giving. You can add any amount to the field of interest fund you establish at any time—and so can others who share your interests in community.

*\* This story represents a composite illustration drawn from actual donor stories of many of the people who give through the Foundation.*

### The Greater Milwaukee Foundation

**provides** a simple, powerful, and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals. We welcome the opportunity to work with you and your adviser to fulfill your unique charitable objectives. For more information and ways to integrate charitable giving into your financial planning, contact the Philanthropic Services Department at 414-272-5805.



Confirmed in compliance with National Standards  
for U.S. Community Foundations

The purpose of this publication is to provide general gift, estate and financial planning information. It is not legal, accounting or other professional advice. Charitable planning has tax and other financial implications, and the services of appropriate advisers should be obtained. Any figures cited in the examples and illustrations may vary based on applicable federal discount rates, which can change on a monthly basis. Some opportunities may not be available in all states.