

Serving Portage
and Waushara Counties



COMMUNITY FOUNDATION
OF CENTRAL WISCONSIN

Providing Advice On Charitable Giving



"The staff and board have a deep knowledge and understanding of the needs in our community. They make it easy for my clients to accomplish their philanthropic goals and leave a legacy that enhances their community."

Jim Robinson
Investment Advisor
& Financial Planner

Connect With Us

1501 Clark Street
Stevens Point, WI 54481

715-342-4454
foundation@cfcwi.org

www.cfcwi.org

The Community Foundation of Central Wisconsin (CFCWI) is a trusted partner to help you fulfill your clients' philanthropic goals. Philanthropic planning is part of many clients' overall planning charitable fund in your client's name or leave a planned gift that will support their community for generations.

Working Together to Inspire Giving

CFCWI provides advisors and donors information and expertise related to charitable giving options. You maintain your client your clients care about most. Our team will provide the resources you need to have productive conversations with your clients.

Community Expertise

CFCWI has been committed to improving the quality of life in Central Wisconsin for more than 35 years. Our extensive knowledge of community needs and nonprofit organizations and resources enhancing Central Wisconsin.

Consider CFCWI as part of these conversations:

- Year-End Tax Planning
- Estate Planning
- Retirement Planning
- Sale of Highly Appreciated Stock
- Substantial Retirement Asset
- Alternative to Establishing a Private Foundation

**When we give together,
our communities grow forever.**

Enriching Your Clients Charitable Giving Strategies

Professional advisors partner with the CFCWI because we make it easy for your clients to accomplish their philanthropic goals while providing a variety of giving options. We offer your client:

Community Focused Option

We make grants to support local organizations and community efforts that focus on our mission areas: Arts and Culture, Education, CFCWI community now, and well into the future.

Planned Giving Expertise

We offer information to advisors that cover a range of planned giving or CFCWI as part of the estate plan.

Variety of Fund Options

The CFCWI offers a variety of funds to meet the charitable wishes of for evaluating potential grant recipients, as well as the ability to give to multiple charities with a single gift.



The Heinz Living Legacy Circle honors those who have made formal plans to leave a gift from their estate to the Community Foundation designated to support the causes they care about the most.

Below is the list of the types of funds we offer:

Type of Fund	Description of Fund	Amount Needed for Funding
Donor Advised Fund	For donors who wish to remain actively involved in recommending grants to their favorite charitable organizations and programs.	\$10,000
Scholarship Fund	For donors who want the opportunity to provide scholarships to students and invest in the future of our community.	\$25,000
Designated Fund	Designed for donors who want to identify specific charitable organizations or programs to received annual support.	\$10,000
Seed-A-Future Fund	For individuals who want build an endowed fund over time. Donors can grow this fund to endowed status in 10 years by contributing as little as \$600 a year.	\$600 a year
Agency Fund	Endowments of local non-profits held at the Foundation for secure, long-term investments.	\$25,000
Field of Interest Fund	For donors with a specific area of charitable interest with a competitive grant application process.	\$50,000
Special Project/Pass-Through Fund	A short-term fund that offers philanthropists the ability to fundraise for community projects.	\$250 Annual Fee

Photo above by Bob Mosier, courtesy of the Stevens Point Area Convention & Visitors Bureau.