

AN EAU CLAIRE COMMUNITY FOUNDATION GUIDE ON

leaving your legacy



Eau Claire
Community
Foundation
For Good. For Ever.

LEGACY SOCIETY
of the Eau Claire Community Foundation

There will come a time in your life when you **stop and reflect** ...

What's your *passion*?

What *legacy* will you leave?

How will you be *remembered*?

Will you leave the world *a better place*?



Become a member of the **Legacy Society**.
To find out more, visit the "Powerful Giving" tab
on our website, www.eccfwi.org.

Eau Claire Community Foundation

The Heart of the Community

For 25 years, ECCF has stewarded charitable funds for Eau Claire area individuals, nonprofits, and businesses. Heartfelt local giving allows us to support meaningful initiatives and connect people for the common good.

This coming year, we're marking our 25th Anniversary with a "Year of Giving" to support our area nonprofits. This exciting initiative will be announced at our Annual Meeting on June 3, 2021.

At ECCF, we use our deep knowledge of the community, expertise in charitable giving, and commitment to permanent, sustainable philanthropy to help community members achieve their philanthropic goals. But we couldn't do our work without your support.

What will be your legacy to the community you love? If you create your legacy during our 25th Anniversary Year of Giving, we will honor your new legacy by giving you the opportunity to make a \$1000 grant (\$500 towards the nonprofit of your choice and an additional \$500 to ECCF's Community Fund, which supports the Community Grant Cycle). This was made possible by the generous support of our Founding Board of Trustees Members.

Other member benefits include invitations to special programs and events, acknowledgment in the Annual Report, other publications, and your name added to the new Legacy Society membership recognition wall in our office.

ECCF will celebrate its 25th anniversary on June 20, 2022, at The Florian Gardens. We hope you'll join us in making it a year to remember!

If you'd like to create a legacy that benefits a cause you love, feel free to contact ECCF. We'd love to be your partner in philanthropy!

With deepest appreciation and gratitude,

Greg Bremer,
Development Committee Chair

Committee Members:

Dr. Jason Beckermann
Cindy Hangartner
Tim Pabich
Jack Postlewaite
Brad Shultz
Paul Weinke

1997-1998 Founding Board of Trustees

Owen Ayres*	Marv Market
Tom Barland	Jack Postlewaite
Dick Cable	Kaye Senn
B.J. Farmer*	Sue Tietz
Jon N. Homstad	Ken Vance*
Dick Larson	Jack Young

**Denotes Deceased*

Your Legacy with Planned Giving

What are your passions? How do you want to be remembered? Do you dream of giving back to the community that has given so much to you? If you want your charitable impact to extend far beyond your lifetime, our Legacy Society can help you support the causes you love for years to come.

What is a Legacy Society?

The Legacy Society recognizes people who leave a lasting charitable legacy by including the Eau Claire Community Foundation (ECCF) in their will, trust or estate plan.

By entrusting gifts to ECCF, you ensure that your contributions will be used wisely to address future community needs and causes that you care about the most.

Benefits of Legacy Giving

Legacy giving offers:

- A role in determining how your legacy gift will be used
- The knowledge that your legacy will benefit causes you love far beyond your lifetime
- Invitations to special donor events
- Tax-wise options for managing your estate
- A relationship with ECCF and other donors during your lifetime
- Recognition on our Legacy Wall and in ECCF publications (unless you desire anonymity)

Why Choose ECCF as your Charitable Partner?

ECCF has 25 years of experience in managing endowments to serve as permanent sources of charitable giving. As the steward of more than 260 funds, we are well positioned to assist you in developing a personal plan for giving through your estate.

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.

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.



The Heart of the Community

How much money do I need to give?

You can leave a gift of any amount. There is no minimum for gifts to existing funds, such as ECCF's Community Fund. The minimum amount to fully fund a new family fund, which could be established through a legacy gift, is:

- \$10,000 for designated, field of interest, or unrestricted funds
- \$15,000 for a scholarship fund
- \$25,000 for a donor advised fund

How long will my named fund last?

Your personal legacy lasts forever through an ECCF endowment. Endowments are carefully invested to achieve long-term growth and perpetual distributions to benefit causes and future generations. But, you do have options. You could:

- Pass through a portion directly to the nonprofits, churches, or schools of your choice
- Designate a percentage to be distributed over a specific period of time
- Establish an endowment that lasts forever

How do I make a planned gift to ECCF?

The simplest way to make a planned gift is to list the Eau Claire 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 the Eau Claire Community Foundation (tax ID 39-1891064) located in Eau Claire, WI _____ Percent of my/our residual estate – OR – the sum of \$_____ to be used for charitable purposes set forth in a Statement of Intent held at the Eau Claire Community Foundation.

A statement of your intent to leave a gift to ECCF is all you need to become a Legacy Society member. ECCF will work with you to document specific ways you would like to be remembered through your gift and how you would like to be recognized. Your gift can be used to establish a new fund that reflects your charitable interests, or you can add it to any of ECCF's existing funds.

We will work with you to create a giving plan that fulfills your charitable vision. You can change your distribution instructions, grantees, and percentages at any time without needing to revise your will. You will also become part of ECCF's Legacy Society.

Thank you for considering a gift that will support the community you love for generations to come.

STATEMENT OF DONOR INTENT

The Legacy Society of the Eau Claire Community Foundation recognizes individuals and families who have made provision for a gift to the Foundation in their estate plan. Membership is by written confirmation of your deferred gift arrangements. Thank you for allowing the Eau Claire Community Foundation (ECCF) to assist you in carrying out your philanthropic goals.

I HAVE INCLUDED ECCF IN MY ESTATE PLAN BY INCLUDING IT IN MY:

- ☐ Will or Revocable Trust
- ☐ Life Insurance Policy
- ☐ Other: _____
- ☐ Charitable Trust
- ☐ Qualified Charitable Distribution (Retirement Plans)
- ☐ The gift will be allocated:
 - (\$ or %) _____ to an existing or to establish a Fund
 - (\$ or %) _____ to ECCF's Community Fund, unrestricted for Eau Claire area
 - (\$ or %) _____ to ECCF's Operations Fund to support ECCF's community work
- ☐ The gift should be added to an existing fund at ECCF as governed by all related agreements:
Name of fund: _____
- ☐ The gift will be used to establish a new fund at ECCF:
New Fund Name: _____
Purpose: _____

Legacy Society Member

- ☐ I am undecided, but interested, call or email me regarding the Legacy Society
- ☐ I accept your invitation to become a Legacy Society Member and give you permission to use the name(s) listed ECCF publications
Name as it will appear in publications: _____
- ☐ The membership will remain anonymous until ECCF receives our legacy bequest
- ☐ The membership will remain anonymous, forever

Name: _____

Address: _____ Phone: _____

City/State/ZIP: _____ Email: _____

Signature: _____ Date: _____

Nonbinding Statement of Intent

These Legacy Society members have included the Eau Claire Community Foundation in their estate plans:

Anonymous (3)
Helen* & Karl* Andresen
Dr. David* & Joan Angell
Richard R. & Sara Solie Baer
Bob & Louise Barfknecht
Janet Barland
Thomas & Jill Barland
Jack* & Carol Bartingale
Jerry & Sue Bauer
Doris J. Bautch
Bill & Winnie Bean
Miss Priscilla Berry
Stephen & Kristine Bien
Preston* & Mary Kay* Bissell
Don & Kim Bodeau
Robert & Andrea Bodeau
Mel & Leann Breed
Gregory Bremer &
Jennifer Hanson-Bremer
Daniel F.* & Margaret J.* Brown
Susan J. Bruce
Thomas & Joyce Bruckner
Dick & Marlene* Cable
Kurt & Tammy Cable
Jim Carter & Victoria Miller
Roger & Betty Davis
Paul Del Torto
Arnie* & Lois* Domer
Don* & Jan Etnier
B.J.* & Bea* Farmer
Jennifer & Joseph Fesenmaier
Cody & Molly Filipczak
Victoria E. Finstad
Larry E. & Ida B.* Fischer
Heidi Fisher
Dr. Louis & Janet Frase
Roy & Janice Fuerstenberg
Richard T. Gannon
Thomas* & Annie Grewe

Charles & Becky Grossklaus
Ann Gunderson Thornburg
Cindy L. Hangartner
Christopher & Julie Hasenberg
Dick & Karen Hebert
Mark & Lois Helland
Lawrence Henkel
Dr. Eldon Hill
Jon N. & Maureen S. Homstad
Edna Hood*
Duane & Laura Hookom
Al & Peggy Jones
John Kaiser & Marcia Van Beek
Dr. David & Alice Katz
Betsy Kell
Dr. Daniel & Kerry Kincaid
Joseph Koehn*
Kathy Kovell
Julia Kyle
Sherry L. Macaul
Richard D. & Marcia D. Larson
John & Jane Lokken
Keith & Alison Martin
Buzz & Mary Ann Minton
Gregg & Emily Moore
Lois & Marlin Mueller
Jon & Erika Munger
Karl Murch
Charles D. & Sue E. Nyberg
Rick & Carol Olson
Karen Overhulser
Tim & Denise Pabich
Jim & Kathy Pinter
Jack & Lois Postlewaite
Lyle & Karyn Quandt
Pat & Sue Quinn
Duane* & Ruth* Sackett
Andrew & Brenda Schlafer
William & Kathleen Schoener

Cindy Schlosser &
Paul Wagner
Steve & Kaye Senn
Flo & Terry* Sheridan
Chuck Shoemaker Jr. &
Lori John-Shoemaker
Bradley J. & Janet E. Smith
Vernon* & Jo Ann Smith
Jerry & Beth Speckien
Jack* Stromwall
Amy Thurston
John* Thurston
Susan & Roger Tietz
Dr. Joseph M.* & Jean M.* Tobin
Gary & Sonya Tourville
Dr. Peter Ullrich &
Susan Pittman
Kenneth* & Roberta Vance
Jan & Kathryn VerHagen
Ron* & Johanna Warloski
Paul & Cheri Weinke
Bonnie Wright
Dr. Jack & Cleo Young

*Denotes deceased

“It has been a great pleasure to participate in the birth and growth of the ECCF. We are delighted to be able to continue to contribute to the well-being of this wonderful community.”

**-Bob and Louise Barfknecht,
Legacy Society Members**



MAKING CONNECTIONS

The Eau Claire Community Foundation helps you support charities you care about. You can donate to its existing Funds or create your own, either now or through your estate. ECCF invests the money, and the earnings support grants to nonprofits. Your gift will benefit our community *forever*.

WAYS TO GIVE

Donate to a Fund

Support existing funds through a gift of any size. You can make your gift in honor of someone important to you. Visit www.eccfwi.org for a complete list of funds.

Learn About Our Committees

Volunteers strengthen ECCF's role as a resource for our community by serving on our diverse array of committees.

Create a Fund

Establish your own family fund with as little as \$500. It will support the nonprofits you care about for years to come.

Become a Women's Giving Circle Member

WGC improves the quality of life for local women and children through collective philanthropy. Become a member with a \$250 donation to the fund.

Become a Legacy Society Member

ECCF established the Legacy Society to recognize its members who have made provisions in their estate plans to provide a gift for the causes they care about the most.

Stories from members



"Your legacy doesn't have to be large, but *leave something to Eau Claire. This is the place to do it.* Whatever legacy you have to leave, that's the right amount."

-Dick Cable, *Legacy Society Member*

"Our world is changing faster and faster, in unpredictable ways. We know there will continue to be people and areas in need. *With our legacy gift to our Fund, we know we will support what's needed in the future for our community.*"

-John & Jane Lokken,
Legacy Society Members

