

You Can Give in a Variety of Ways

Giving to Madison Community Foundation (MCF) 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 whose giving is advised by MCF, such as the Community Impact Fund.

Make a Cash Gift

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.** You can make a gift using your credit card at www.madisongives.org/givetoMCF or through the mail. Your gift amount will be reduced by the merchant processing fees for credit card transactions, which are approximately 4%.
- **EFTs.** You can set up an automatic monthly gift to come directly from a checking or savings account. You can find the EFT form at madisongives.org under the *Ways to Give/Cash* section, or you can call our office and we will send you a form.

Give Securities

Giving securities and mutual fund shares offers an immediate charitable deduction for the full fair market value of the donated assets (subject to any limitations based on your adjusted gross income). You also will not have to pay capital gains tax on the appreciation for donated securities. If you wish to contribute shares of publicly traded stock or mutual funds, call our office to let us know of your plans. We can provide you with the information to give your broker to initiate the transfer.

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

Fund Your Giving With Life Insurance

Life insurance is one of the easiest ways to leave a legacy. If the policy premiums are complete, simply name Madison Community Foundation as beneficiary. If premium payments are needed, you can assign your insurance policy to MCF 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

Name MCF as Beneficiary of Your Retirement Accounts

Naming MCF as the beneficiary of your Individual Retirement Account (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://www.madisongives.org) under the *Ways to Give/Retirement Plan Beneficiary Designation* section, allows you to designate where you would like the assets to go, and the impact you want your gift to have.

When making your beneficiary designation, use the following:

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

Purchase a Charitable Gift Annuity

A charitable gift annuity (CGA) allows you to make a tax-deductible gift today and receive a guaranteed income for your lifetime and the lifetime of another, if you choose. Annuity payments may begin immediately or be deferred. The remainder of the CGA is used to benefit an endowment of the donor's choice.

Questions?

If you have questions about gift options, please contact:

David Koehler, *Vice President of Donor Engagement*

dkoehler@madisongives.org

608.232.1763

Give Through Your 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 bequests to your family members are satisfied.

When making your beneficiary designation, use the following:

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

Donate Real Estate

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

Any real estate considered must have a reasonable expectation of being sold within a year, and must not jeopardize MCF's nonprofit status or expose it to expenses. 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.

MCF will consider gifts of tangible personal property, such as art, collectibles or jewelry on a case-by-case basis. MCF cannot accept gifts of tangible property such as furniture, livestock, cars or boats.