

Let's Talk About It!

Conversation Starting Tips

If you're thinking about counting your community among your heirs, it's important to tell your attorney, accountant, insurance agent and/or financial planner. Each will have ideas that can financially benefit your heirs and your community. You may also wish to share your decision with your family, so they understand how important your community is to you.

1. **Share what is important to you.**

Did you grow up here? Do you consider this your adopted hometown?

2. **Talk about your charitable investment ideas.**

Is there something in your life that has been especially helpful to you? Or, is there an issue that you'd like to address through a charitable investment?

Here are some examples to get you started:

- **Education.** Did someone help you get a scholarship? Or, were no scholarships available to help you for some reason? If so, can you address that through a charitable investment that helps a non-traditional student return to school or a single parent get a degree?
- **Business.** Did you long for job re-training or dream of starting your own business, but found resources lacking? What about a charitable investment that supports entrepreneurial training?
- **Children.** Do you see families struggling with child care and want to do something about that? Do you worry about children getting access to proper health care?
- **Recreation.** Do you have a fondness for our natural resources? Does childhood obesity concern you? Perhaps you'd like to see children get outside and play.

Whatever your charitable interest, we can help you find a way to make it happen. The livability of this community depends on that!

3. **Consider a flexible gift.**

Sometimes issues facing communities are interconnected. If you see those interconnections, remember that your gift can be set up to be flexible. That way, your charitable investment can be used to address the community's most urgent needs in areas that interest you.

The Donors Forum of Wisconsin is here to help; we can connect you to more information and a Certified Community Foundation in your area. If we can answer questions or provide additional information, please contact us at (414) 270-1978.

