

ADVISORIMPACT

Brought to you by the Oshkosh Area Community Foundation

February 2019

In This Issue

Greetings!

From the Expert

Thank you for subscribing to our Advisor Impact newsletter. We hope you find this newsletter valuable and if you have any questions or concerns, please give me a call at 920-426-3993 or email

Philanthropic Snapshot

Karlene@OshkoshAreaCF.org

Case Study

You're Invited

Sincerely,

Questions?
Give us a call at
920.426.3993
or [email](mailto:Karlene@OshkoshAreaCF.org)



Karlene Grabner
Director of Donor Services



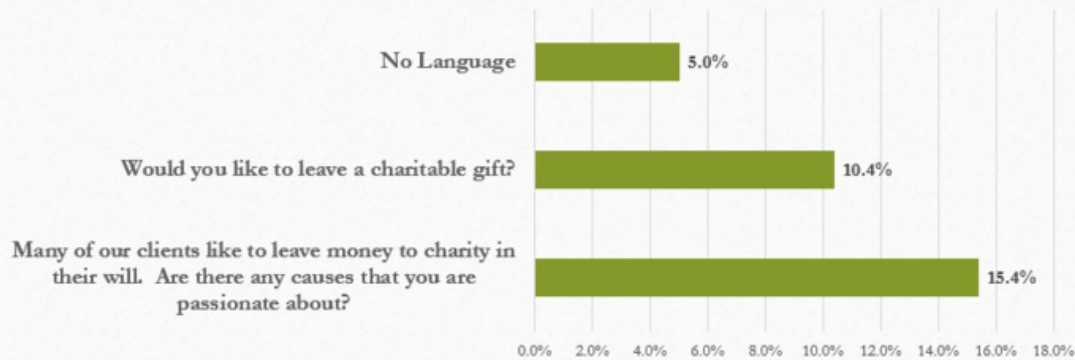
OSHKOSH AREA
COMMUNITY
FOUNDATION

From the Expert - Want To Boost Your Estate Planning Gifts? Wording is Important! - *Russell James, Professor of Charitable Financial Planning at Texas Tech University*

Professor Russell James from Texas Tech refers to a study in which professional advisors asked their clients if they would like to include a charitable bequest in their estate plan. As it turns out, the wording of the request resulted in a significantly different response rate.

When a professional advisor did not ask their client about making a charitable gift, around 5.0% of clients included a charitable bequest in their planning. By being more intentional by asking, "Would you like to leave a charitable gift" - the response rate...[click here to read on.](#)

Wording is Important!



Philanthropic Snapshot - Donor Advised Funds

Last year, the **Grieving Childrens Fund**, a donor advised fund, was established to support children in Winnebago County and the state of Wisconsin who have lost loved ones. By establishing a donor advised fund, the donor has complete control of what organizations and programs they wish to grant to that support children during this difficult time.



Donor Advised Funds can also be made in the donor's name, like the **Mark D. and Christine G. Troutd Donor Advised Fund**; or made in a company name, like the **Provident Financial Consultants Fund**.

Donor Advised Funds are *unique*. With a simple gift (\$10,000 recommended minimum), donors can maintain a hands-on and flexible approach to their charitable giving. Fund holders may recommend grants from the fund as frequently as they wish.

Learn more about why a Donor Advised Fund may be the perfect fit for your donor.

In our last Advisor Impact newsletter, we featured an article about planning for the 2018 tax reform, written by Robert A. Mathers, Attorney with von Briesen, von Briesen & Ropers, s.c.

This article included great information on the benefits of Donor Advised Funds and bunching your donations. **Read here** to learn why a Donor Advised Fund can be a critical tool to bunch your donations.

Interested in learning more about a Donor Advised Fund? Browse our newly released **Donor Advised Fund handbook** to help answer all your questions, or give me a call. 920.426.3993



Support for parks in the Oshkosh area have increased thanks to two new funds established at the Oshkosh Area Community Foundation. These funds were created by an anonymous donor and from a bequest.

The **Bob Gertsch City Parks Fund** is a field of interest fund that provides support for the benefit of parks in the city of Oshkosh.

The **Oshkosh Parks Foundation Fund** is an agency designated fund that will support the Oshkosh Parks Department. The fund will consist of private dollars that go over and above the city budget for city parks improvements and development determined by the current Parks Director. The fund shall be used to enhance the community's quality of life through parks and open spaces by aligning philanthropic investment with the Parks Department strategic plan, the department's Comprehensive Outdoor Recreation Plan and special park projects that may arise.

You're Invited - Celebrate Education



Celebrate Education

Join us for this annual event honoring the educators, administrators and volunteers who enrich the lives of students in our community. Educators from public and private schools will be recognized with classroom and professional grants, along with other leaders and volunteers who will be recognized for their innovated contributions to education. Help us celebrate their accomplishments!

March 18, 2019
4:30 - 6:00 PM
Oshkosh Convention Center
2 N Main Street, Oshkosh

[RSVP here](#)

Advisor Info

Need more advisor specific information? Click on the link to the left or contact our Director of Donor Services, [Karlene Grabner](#).

Connect with us



Since 1928, the Oshkosh Area Community Foundation has helped donors turn their charitable investments into projects that add energy and vitality to our community. Serving Winnebago County, Waushara County, Green Lake County and Ripon, the Oshkosh Area Community Foundation strives to advance our communities' quality of life and capacity for excellence.

We are a 501(c)3 nonprofit organization, with more than 700 charitable funds and \$100 million in assets.