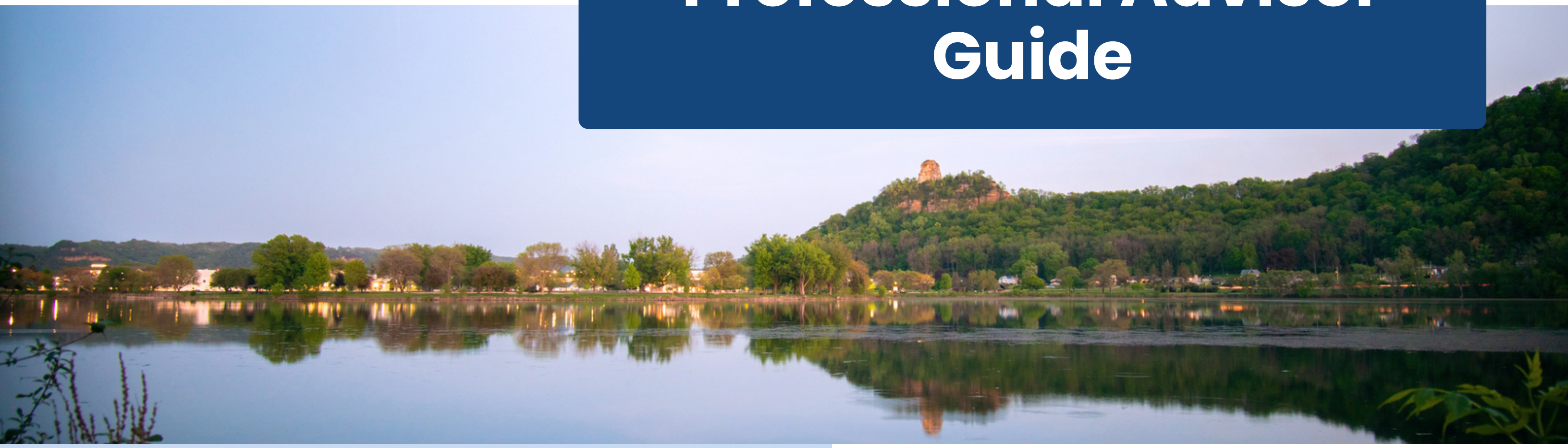
WINONA COMMUNITY FOUNDATION

Professional Advisor Guide



Partner with Us

Connections

As civic leaders, we can connect you to our community's biggest issues, and the hundreds of local, trusted nonprofit organizations working to solve them.

IMA Option

Our Individually Managed Accounts (IMAs) mean our partnerships are mutually beneficial.

Convenient Back-Office Services

Our team of professionals handles all the administrative oversight of your client's giving, including vetting, distributing, accounting, receipting, and reporting.

Investment Performance

with oversight from our Investment Committee, our $20 million in investments open doors to greater asset class diversification.

Networking

Our 100+ non-profit members help us stay on top of charitable giving needs and help us build educational opportunities to share knowledge with you, too.

Full-Service Philanthropy

- **Philanthropic planning, issue and organization research, and customized site visits**
- **Family meeting facilitation, tailored trainings, and succession planning**
- **Legacy fund preparations**
- **Online access to monthly statements and donor-directed grantmaking portal**
- **Finance and investment meetings with our Finance Director or President/CEO**

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Ways of Giving

Giving Now

Individually Managed Accounts (IMAs)

An IMA allows the financial advisors to manage the charitable assets of their client after a Donor-Advised Fund is established.

Donor Advised Funds (DAFs)

A simpler, more flexible and efficient alternative to creating a private foundation. You can contribute as often as you would like and receive the maximum tax deductions allowed. A DAF can support the causes and communities that matter most to you, while the Community Foundation administers grants to your preferred charities (local or national).

Field of Interest Funds

If you have a strong interest in a specific cause, this type of fund might be a good fit. Field of Interest funds allow the Community Foundation to make grants to the greatest need within your field of interest.

Designated Funds

If you have a passion for a specific nonprofit and its mission, this is the fund for you.

Scholarship Funds

Scholarship funds allow you to honor a loved one or a specific population of students, while giving back to the community with scholarships for education.

Giving Later

Legacy Funds

Establish a fund on paper now and activate it at a specific point in time, whether through the sale of a business or a designation in your will.

Charitable Gift Annuity

A gift annuity funded during life provides you with a charitable income tax deduction and partly tax-free income.

Charitable Remainder Trusts

A charitable remainder trust enables people to receive income for the life of the trust, with the remainder of the donated assets directed to your philanthropic goals.

Charitable Lead Trusts

If you have a passion for a specific nonprofit and its mission, this is the fund for you.

Donate directly to an existing fund

General Operating Fund

Giving directly to the Community Foundation sustains and enhances our capabilities to support the ever-changing needs of our region.

Browse a variety of public charitable funds

Established by the Foundation with community partners and donors

Charitable Instruments

We accept a wide variety of assets, and can facilitate even the most complex forms of giving.

Let's work together to design your perfect plan.

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Cash

A simple way to give that provides an immediate tax deduction at the highest levels. Cash is easily earmarked for a current need or endowment fund.

IRAs and Other Qualified Retirement Plans

Heirs may realize substantial tax savings if you name a charitable fund as beneficiary of your retirement plan. Name charities to benefit from your fund or name heirs as advisors.

Appreciated Securities

We accept closely held and publicly traded stock. Give appreciated stock or mutual fund shares that you have held for more than one year and avoid capital gains taxes and earn a charitable tax deduction based on the market value.

Real Estate

If held for more than a year, real estate usually provides the same tax benefits as gifts of securities.

Life Insurance

You can name the Community Foundation as the owner and beneficiary of a policy or retain ownership and name us as a primary or contingent beneficiary.

Bequests and Trusts

Establishing a charitable fund through a will or other giving vehicle is simple, minimizes estate taxes and can be advised by heirs. Contact us for sample language.

Convert a Private Foundation

There are several benefits to converting a private foundation that we are happy to discuss.