



## Partnering with the Wisconsin Foundation UCC

### Investing and administering your congregation's assets



Establishing a Church Fund at the Wisconsin Foundation United Church of Christ is a simple and efficient way to handle the endowment, long-term or reserve assets of your congregation. The Wisconsin Conference created the Foundation to help your congregation develop planned giving programs, process complex gifts, and professionally handle the investment management and administrative details so that your staff and volunteer hours can concentrate on fulfilling your mission.

Your donors can be sure that the endowed fund's principal will not be spent and can grow over time, providing a source of lasting support. Your organization's donors can leave a bequest through the Wisconsin Foundation UCC to benefit your congregation and create a personal legacy. The Wisconsin Foundation UCC can even facilitate the most complex planned gifts, gifts of appreciated stock, closely held companies, artwork, real estate or other personal property.

The Wisconsin Foundation UCC's economies of scale provide your organization the benefits of a diverse investment portfolio and lower investment fees. The Foundation's investments reflect the vision and values of the United Church of Christ, ensuring socially responsible investment returns.

#### KEY BENEFITS OF THE FOUNDATION

- PROFESSIONAL PHILANTHROPIST HELPING YOU TO RAISE NEW GIFTS TO YOUR CONGREGATION
- STRONG INVESTMENT MANAGEMENT ALIGNED WITH OUR SOCIAL VALUES BY THE PENSION BOARDS OF THE UCC
- EXTERNALLY AUDITED AND TRANSPARENT FINANCIAL REPORTS

## How it works

- Your Board determines how much you would like to invest long-term and places the money in a special fund or funds created at the Wisconsin Foundation UCC in the name you choose.
- The Foundation becomes an extension of your own fundraising and administrative staff. We can assist you in negotiating the myriad of complex charitable trusts and process gifts of securities, closely held stock, artwork, and real estate. We can even acknowledge contributions on your behalf. Of course the proceeds are always placed in your congregation's Fund for your future use.
- We handle all the investment details through our central investment pool. Professional investment management by the Pension Boards UCC selects and manages our portfolio with an eye on total return and socially responsible investing that reflects the vision and values of the UCC.
- Your Board determines the criteria under which assets can be withdrawn from your Fund. Some congregations create true endowments while others establish funds to hold long-term capital assets or an operational reserve which can be spent down to nothing as needed.
- You can also use a Fund at the Foundation as an umbrella for 501(c)(3) public charity status - ensuring that your donors continue to receive the most preferential tax treatment allowed by law.
- We provide the financial transparency many donors seek: high quality fund accounting, professional external audits, and publicly available 990's.

### FOUNDATION BOARD OF DIRECTORS

REV. ANDREW WARNER, PRESIDENT  
REV. FRANZ RIGERT, CHAIR  
BRET BICOY, VICE-CHAIR  
REV. DR. LESLIE SCHENK, TREASURER  
STEVE HIRBY, SECRETARY  
REV. JIM HOLLISTER  
PAUL KARCH

### FOUNDATION MISSION

THE WISCONSIN FOUNDATION UCC IS A CATALYST FOR POSITIVE CHANGE IN THE LIFE OF THE UCC IN WISCONSIN; PROMOTES A CULTURE OF GENEROSITY; AND CONNECTS PEOPLE ACROSS THE UCC IN WORKING FOR A MORE JUST WORLD.

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