

Step 12

Gift Acceptance

A variety of gifts may be accepted by the Community Foundation on behalf of the Community Fund (see gift acceptance policy step 4).

Gifts of cash/checks made out to the Community Fund are sent or forwarded to the Community Foundation along with all original documents including original envelopes. Any special instructions should also be included.

Donors wishing to gift appreciated securities (stock) should contact the Community Foundation for special instructions.

The IRS requires that donors retain proof of any size gift by method of bank record or receipt. The Community Foundation recognizes gifts of \$250 or more by sending out a written acknowledgement to the donor. The Foundation does not acknowledge gifts under \$250. However, the secretary or other appointed person of the Community Fund is encouraged to write a personal thank you on behalf of the Fund for all gifts received. CFSW staff will keep the Advisory Board Members informed of gifts.

Donors who give \$100 aggregate within the fiscal year, are acknowledged in the Annual Report. Please keep in mind the Foundation's *fiscal year begins July 1st through June 30th*.

Please call donor service representatives in your service area with gift questions (see front of book for numbers)

«AckDate»

«Name»
«Organization»
«Address1»
«Address2»
«CityStZip»

Dear «Salutation»,

It is always a privilege to encounter those who are passionate about strengthening Wisconsin communities. On «GiftDate», we received your gift of «GiftAmount» to the «Fund». This letter serves as the receipt for tax purposes.

Your generosity is greatly appreciated. The Community Foundation of Southern Wisconsin, Inc. was established in 1992 as a tax-exempt public charity. We receive and invest tax-deductible gifts and distribute grant awards to enhance the quality of life in Southern Wisconsin and beyond. We currently have 450 funds supporting an array of charitable interests.

Again thank you; your support will be most helpful in strengthening these efforts.

Please let us know if we can be of further assistance.

Best wishes,

Sue Conley
Executive Director

NOTE: No goods or services were provided in exchange for this contribution.

The «Fund» is a component of the Community Foundation of Southern Wisconsin, Inc. which has exclusive legal control over the contributed assets, and as such is subject to the Foundation's authority to redirect the grants from the fund if distribution from «Fund» becomes unnecessary, impossible or inconsistent with the needs of the community.