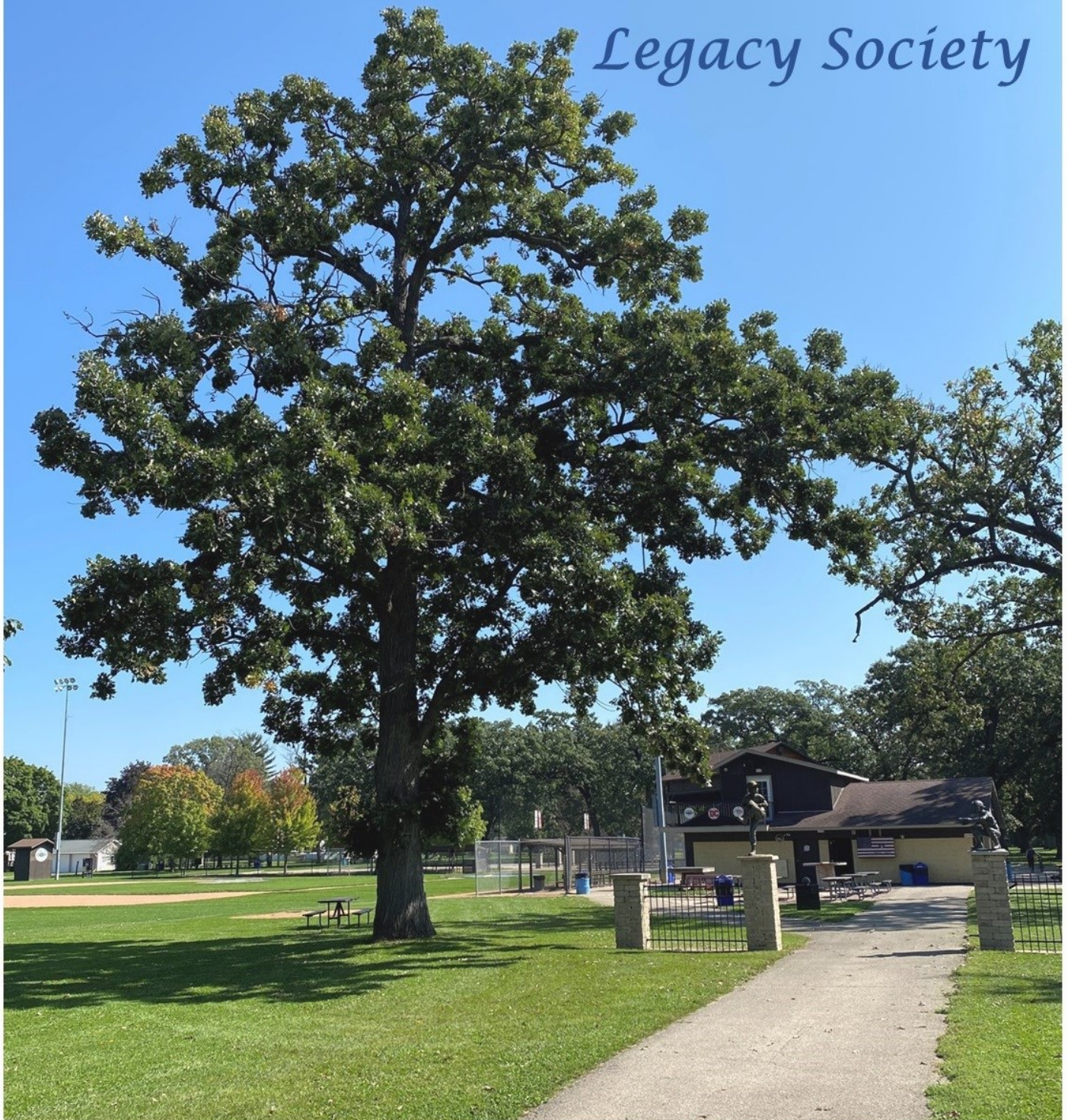


THE FORT ATKINSON COMMUNITY FOUNDATION INTRODUCES

*The Bur Oak  
Legacy Society*



**FORT ATKINSON**  
COMMUNITY FOUNDATION

*Where Gifts Today Build Better Tomorrows*



There may come a time in your life when you stop and reflect . . .

What legacy will I leave? What can I do for my community?

How will I be remembered?



Become a member of the Bur Oak Society—the Legacy Society of the Fort Atkinson Community Foundation.

To learn more, visit the Bur Oak Society tab on our website,  
[www.fortfoundation.org](http://www.fortfoundation.org)



**FORT ATKINSON**  
COMMUNITY FOUNDATION

## Our Vision: A Better Fort Atkinson

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2023 marks the **50th anniversary** of the Fort Atkinson Community Foundation!

For 50 years, the Foundation has worked with our generous donors to pool charitable resources to make a difference in our community. Since 1973, we have distributed over \$23.4 million in grants and scholarships, enhancing the quality of life in our community, fostering success for our local nonprofits, and investing in our young people.

To celebrate this milestone, and to further the mission of the Foundation, we are excited to announce a new initiative – the creation of The Bur Oak Legacy Society – to focus on the real heroes behind the Foundation – our donors.

The Bur Oak Legacy Society will recognize people who leave a lasting charitable legacy by including the Fort Atkinson Community Foundation in their will, trust, or estate plan.

What will be your legacy to the community we've been building? Where could you make a difference?

If you'd like to leave a legacy to benefit a cause or a nonprofit you care about, please contact us. We'd love to welcome you into our new Bur Oak Society and be your partner in philanthropy!

Gratefully,

Sue Johnson, Chairman

Fort Atkinson Community Foundation

### **2023 FAF Board of Directors:**

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Sue Johnson

Sally Koehler

Lisa Carras

Jim Schulenburg

Bonnie Geyer

### **1973 Original Board of Directors:**

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Allan Haukom

Milo Jones

Mark Kerschensteiner

Milt Lorman

Robert Martin



## Your Legacy Through Planned Giving

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Our Bur Oak Society can help you support the causes and organizations you love for years to come through targeted, intentional giving.



### What is the Bur Oak Legacy Society?

The Bur Oak Legacy Society recognizes people who leave a lasting charitable legacy by including the Fort Atkinson Community Foundation (FACF) in their will, trust or estate plan.

By entrusting gifts to FACF, you ensure that your contributions will be used wisely to address future community needs and the causes that you care about the most.

### What is Planned Giving?

Planned giving is philanthropy combined with smart financial planning. It helps you make the most of your assets during your lifetime and helps you make future charitable gifts that are often much larger than you may have thought possible.

Together with your financial or legal advisor, we can help you support the charitable organizations you care about while making the most advantageous financial decisions for you and your family.

### Benefits of Legacy Giving:

- ◆ A role in determining how your legacy gift will be used
- ◆ The knowledge that your legacy will benefit causes you love far beyond your lifetime
- ◆ Tax-wise options for managing your estate
- ◆ A strong relationship with FACF during your lifetime, including a small welcome gift, personal notes, and regular updates of FACF activities
- ◆ Recognition in FACF publications (unless you desire anonymity)

## Why the Bur Oak?



The iconic oak tree of Wisconsin, the majestic Bur Oak represents so much of what we value. Like us, the Bur Oak is long-lived. Its deep roots allow it to tolerate drought and it is resistant to air pollution and heat stress. It endures. In addition, the Bur Oak adds great value to the neighborhood, providing dense shade, shelter, and food for those who count on it. We have many Bur Oaks in Fort Atkinson, most notably, the grove in Jones Park.



## How much money do I need to give?

You can leave a gift of any amount. There is no minimum for gifts to existing funds.

The minimum amount to open a new fund through a legacy gift is:

- ◆ \$15,000 for a Designated, Donor-Advised or Field of Interest funds
- ◆ \$20,000 for a Scholarship Fund

## How long will my named fund last?

Your personal legacy lasts forever through a FACH endowment. Endowments are carefully invested to achieve long-term growth and perpetual distributions to benefit causes and future generations.



*It is with great pleasure that I become a member of the Bur Oak Society of the Fort Atkinson Community Foundation. Through my involvement with FACH as a director, volunteer scholarship chair, then Program Administrator, I developed a great respect for the Foundation, its governance, and its contributions to the greater Fort Atkinson community. My husband, Fred, and I were excited to establish the Rose Inspire A Dream Scholarship in 2008 and I have continued to support it since. By specifically naming the Fort Atkinson Community Foundation in my estate plans, I continue that support. Although I moved from Fort Atkinson about 10 years ago to live closer to family, Fort will always seem like my “home town.”*

- Helen Rose

## How do I Make a Planned Gift to FACH?

The simplest way to make a planned gift is to designate the Fort Atkinson Community Foundation as a beneficiary of your retirement asset, life insurance policy and/or an investment account held outside of a trust using the relevant asset’s beneficiary designation form. Specifically designating FACH as beneficiary of such assets allows the property to pass free of probate and the expenses, court fees, public record requirements and lengthy timelines that goes with it. Additionally, it deserves noting that naming FACH as beneficiary of a retirement account and passing other non-tax deferred assets to your loved ones could spare them and/or your estate a sizable tax bill.

Alternatively, you may also leave a planned gift by including specific language in your will or trust, such as:

I/we bequeath to the Fort Atkinson Community Foundation (tax ID# 39-6220899), located in Fort Atkinson, WI \_\_\_\_ percent of my/our residual estate — OR — the sum of \$\_\_\_\_\_ to be used for charitable purposes set forth in a Statement of Intent held at the said Community Foundation.

A statement of your intent to leave a gift to FACH is all you need to become a Bur Oak Legacy Society member. We will work with you to determine the specific ways you would like your gift to be used and how you would like to be recognized. Your gift can be used to establish a new fund that reflects your charitable interests or you can add it to any of FACH’s existing funds. And you can change your distribution instructions, beneficiaries, and percentages at any time.





Thank you for your commitment to the Fort Atkinson Community Foundation (FACF). To better understand your intentions for this gift, we ask that you complete this form with as much detail as you are comfortable sharing. The information you provide is not legally binding and we understand that you may wish to change your gift in the future. Questions? Please call FACF at (920) 563-3210.

### Your Contact Information

Name(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email: \_\_\_\_\_

### About Your Gift - I have included FACF in my estate plan by including it in my (check all that apply):

Will     Trust     IRA or Retirement Plan Assets     Life Insurance Policy

Investment Account    Other \_\_\_\_\_

If you are willing to provide an estimate of the value of your gift, please use today's dollars:

The approximate value of my gift is: \$ \_\_\_\_\_ or \_\_\_\_\_% of my estate or residue

### Your Gift Will Support

\$ or % \_\_\_\_\_ General Fund—unrestricted, able to respond to changing needs of community.

\$ or % \_\_\_\_\_ An Existing Fund held at FACF \_\_\_\_\_  
Fund name

\$ or % \_\_\_\_\_ A new Fund named: \_\_\_\_\_  
(FACF will work with you on the details)

%s must add up to 100%

### Acknowledging Your Gift & Bur Oak Society

FACF may publicly acknowledge my/our gift. Please list our names as:

\_\_\_\_\_

Anonymous     If anonymous, you may publicly recognize my/our gift once it is realized.

My/Our legacy gift will create or add to a permanent endowment fund at FACF, and I/we would like to become a member of FACF's Bur Oak Legacy Society.

Signature(s): \_\_\_\_\_ Date: \_\_\_\_\_

Please return completed form to 244 N. Main St., Fort Atkinson, WI 53538 or [facf@fortfoundation.org](mailto:facf@fortfoundation.org)

**Fort Atkinson Community Foundation (tax ID# 39-6220899)**



# Bur Oak Society Roster

Theodore and Marilyn Batterman\*  
Doug and Marianna Dexter\*  
Helen Rose

John G. Slater\*  
Jim and Lee Vance\*

\*denotes bequest realized

**Consider making a commitment to FAF as they have — we'd love to welcome you to our Bur Oak Society! For more information, contact Sue Hartwick, FAF Executive Director, at (920) 563-3210 or [facf@fortfoundation.org](mailto:facf@fortfoundation.org).**



Everywhere you go in Fort Atkinson, you can see the impact of our donors—from the bike path to the riverwalk, from the aquatic center to the skate park, from the fabulous Hoard Museum to our beautiful library.







**FORT ATKINSON**  
COMMUNITY FOUNDATION

**Our Mission:** Improving the quality of life in Fort Atkinson by inspiring and supporting enduring philanthropy.

**Our Vision:** A Better Fort Atkinson

About Us: The Fort Atkinson Community Foundation helps you support the charities and the causes you care about. You can donate to its existing funds or you can create your own, either now or through your estate. FACF invests the money, and the earnings support grants to nonprofits. You gift will benefit our community **FOREVER.**



The magnificent Bur Oak, estimated to be at least 300 years old, at the First Congregational Church.

Fort Atkinson Community Foundation - 244 N. Main St., Fort Atkinson, WI 53538 - (920) 563-3210

[facf@fortfoundation.org](mailto:facf@fortfoundation.org)

[www.fortfoundation.org](http://www.fortfoundation.org)