

ESTABLISH AN ENDOWMENT FUND

WITH THE WISCONSIN HISTORICAL FOUNDATION

Each year, over 400 local history organizations from every corner of Wisconsin work tirelessly to collect and safeguard countless artifacts and share the stories of Wisconsin's local communities.

The Wisconsin Historical Society and its official fundraising organization, the Wisconsin Historical Foundation, are committed to do everything they can to assist Wisconsin's vibrant local history community. That's why the Foundation has developed an exciting new opportunity for local history affiliates to sustain their excellent work far into the future.

Local history affiliates of the Society can now establish an endowment fund with the Wisconsin Historical Foundation. The Foundation will invest and administer these funds within the Foundation's general portfolio. Annually, when directed by the local history affiliate, the Foundation will distribute proceeds from the fund back to the affiliate.

“The major financial and operational commitments of the Wisconsin Council for Local History are for the mini-grant program, which annually provides \$12,500 in matching grants for our affiliates. Understanding the need to ensure and grow this level of support in perpetuity, the Council established the Local History Endowment within the Foundation.”

John Decker, Past President
Wisconsin Council for Local History



WISCONSIN
HISTORICAL
SOCIETY



Wisconsin Historical
FOUNDATION

KEY FEATURES OF ENDOWMENT FUND

- Incorporation into the Wisconsin Historical Foundation's long-standing and professionally managed investment portfolio
- Annual distribution amount determined by the affiliate
- Low 0.5% annual fee
- Access to professional fundraising staff who will assist affiliates manage the receipt of complex gifts such as stock, IRA distributions, real estate, and estate gifts
- Affiliate leaders and donors will be included in the Society's membership benefits program
- Minimum fund balance is only \$25,000
- Contributions to increase the funds balance can be made at any time

“*The St. Croix Fall Historical Society established an endowment fund with the Wisconsin Historical Foundation to ensure long-term support for our organization and take advantage of the Foundation's existing, professional investment management structure.*”

Dave Ollman, Treasurer
St. Croix Falls Historical Society



To learn more about establishing a fund with the Wisconsin Historical Foundation contact:

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