Peter Lettenberger, a founding member of Waukesha County Community Foundation (WCCF), presented the Celebration of Giving award to Beverly Chappie, another WCCF founding member, at the Foundation’s annual fund holder gathering on May 22. The event was held at Westmoor Country Club in Brookfield. Both Peter and Beverly were instrumental in the establishment of WCCF in 1999. The foundation, now in its twentieth year, has given out more than $32.5 million in grants and scholarships, primarily in Waukesha County and the surrounding areas.

The Celebration of Giving Award was established in 2006 to recognize an exemplary donor, while also raising awareness about the work of WCCF and the vital importance of philanthropy to the area’s nonprofit organizations. “You are enriching the lives of all of Waukesha County and beyond, keeping our dreams alive,” Beverly told the attendees during her acceptance speech. Additionally, she stated, “Onward and upward toward the $100 million (goal of the Foundation).”

The Celebration of Giving Award Honoree

Peter Lettenberger, Beverly Chappie

CELEBRATING THE FOUNDATION’S TWENTIETH YEAR

Leon Janssen, Rich Labinski
Herta Benz, Tony and Andrea Bryant, Dixon Benz
Karin Kultgen MD, Jill and Mike Duckett
Mervyn Byrd, Jim Mueller, Ron Jahnke
Lynn Delzer, Jan Delzer

(262) 513-1861
WaukeshaFoundation.org
2727 N. Grandview Boulevard, Suite 301
Waukesha, WI 53188
Stacie Andritsch is the System Vice President and Associate General Counsel at Advocate Aurora Health (“AAH”). In this role she manages the employment and labor law work for AAH, which employs over 70,000 team members. After graduating from Marquette Law School, she joined Michael Best & Friedrich and after ten years, she started working as in-house counsel at Wheaton Franciscan Healthcare and continued there until she joined AAH in 2016. She currently is a board member at the YMCA at Pabst Farms and an advisory board member for Family Service. Stacie and her husband, Rick, reside in Oconomowoc, WI.

Jan Wade joined Hearst Television as President and General Manager of WISN-TV, the ABC affiliate in Milwaukee in 2007 and continues to serve in that role. She’s been in senior positions with leading TV stations in many markets including Minneapolis, Providence, Nashville, Louisville, and Tampa. Jan earned a Bachelor of Science degree from Ball State University, with a Journalism and Broadcast double major. Jan is very active in the Milwaukee community, having served on numerous non-profit boards. She is a past president of the board of the Sharon Lynne Wilson Center for the Arts and currently serves on the boards of the Pabst Mansion, Milwaukee Women Inc., MYSO, Florentine Opera, and the executive committee and board of the Wisconsin Broadcasters Association and the WBA Foundation. Jan resides in Waukesha, WI.

Jerry Flood is an award-winning attorney with von Briesen & Roper SC in Waukesha. He provides estate planning services including wills, trusts, marital property agreements, powers of attorney, gifting strategies, probate administration, and succession planning for both Wisconsin and Florida residents. He is active in the community, most recently serving as an Advisory Board Member for the Medical College of Wisconsin’s Digestive Disease Center. Jerry and his wife, Nancy, split their time between Brookfield, WI and North Venice, FL.

Planning Strategies for Charitable Donations

Katrina M. Pipasts, CSPG, Senior Vice President, Northern Trust - Foundation & Institutional Advisor

Since the Tax Cuts and Jobs Act of 2017 legislation became law, many donors continue to evaluate how the increase in the standard deduction impacts their charitable giving goals. Here are a few strategies that can be employed by donors who have stopped itemizing or who want to give in a more tax efficient way:

- An outright gift of appreciated marketable securities can still avoid capital gains tax to the donor. If the gift is large enough to allow the donor to itemize, it can be a double tax benefit with a charitable deduction on the current fair market value of the asset.
- Even though the standard deduction was nearly doubled, donors may still be able to itemize contributions by a technique called “bunching.” This approach involves consolidating charitable contributions into a single tax year that otherwise would have been made over multiple tax years. In the giving year, based upon the amount, the donor may be able to itemize deductions. One way to maximize this technique might be to put their lump sum charitable contribution into a donor advised fund and elect to grant distributions over subsequent years. In the off-years, the donor takes the standard deduction.
- Donors over 70½ can make a qualified charitable distribution directly from a Traditional or Roth Individual Retirement Account, up to $100,000. Although the donor is not entitled to an income tax charitable deduction, the rollover satisfies the donor’s required minimum distribution and avoids all income tax on the withdrawal.
- Donors can also demonstrate their charitable intent in their estate planning documents. Estates continue to enjoy an unlimited estate tax deduction on charitable gifts. Donors can also name charities as beneficiaries of their IRA or qualified retirement plans.

Giving is emotional. Working with legal counsel and tax advisors, donors can find the most tax-efficient solution for satisfying their charitable goals.
DR. BRIAN YAGODA MEMORIAL FUND
After the loss of her husband, Dr. Brian Yagoda, in a bicycle accident in June of 2018, Shirley Yagoda jumped into action to raise money to pave the shoulders on a stretch of Golf Road in Delafield. She organized a fundraising event at Wine Maniacs Bar and Bistro in Oconomowoc and created a Go Fund Me page. In total, more than $70,000 was raised. The paving project was completed before Father’s Day, a fitting tribute for Brian, and just in time for the summer biking season. Donations are still welcome as all additional funds will be used to pave more areas of concern in Waukesha County.

FREDERICK C. CHRISTENSEN MEMORIAL FUND
Friends and family of Frederick Christensen recently gathered to celebrate his life and to raise money toward the scholarship fund set up in his name through the Waukesha County Community Foundation. The night was considered a success, with funds raised from over 60 available raffle items received from local business and sports teams, a free-will donation taco bar, and 50/50 raffle. Held at the Waukesha Elk’s Lodge #400, attendees enjoyed a night of music and dancing, provided by Shakedown the Band, Billy Lethal, and special guests. We look forward to next year’s third annual FredFest, already scheduled for May 15th, 2020. See you there!
The Waukesha County Community Foundation Wisconsin Athletic Club Fund is striving to raise a minimum of $50,000 for the Community Conservation Partnership, a collaboration between Waukesha County Land Conservancy and Wisconsin Hero Outdoors. Funds will help connect Wisconsin’s veterans, first responders, and people from our underserved Latinx and African American communities with the life-giving benefits of nature.

Planned programming includes kayak fishing and safety training events (with new ADA-compliant equipment), turkey hunting, volunteer workdays and trail building, nature restoration projects, environment education and outreach opportunities, and volunteer/internship opportunities to help all participants gain valuable skills.

Please contact WCCF if you would like to attend the Wisconsin Athletic Club event being held on August 15 where you can hear more about this exciting collaboration.

To donate online, go to: waukeshafoundation.org/wac.

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The 5th Annual Jump for Archie event was held May 15th in Oconomowoc with proceeds benefitting SOFA, Inc. Archie Badura Memorial Fund. SOFA continues to raise awareness and assist in the fight against the opioid epidemic.

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The Katelyn Ann Fennig Memorial Fund raises funds to support mental health services and provide scholarships for underserved/underprivileged adolescents in Milwaukee and Waukesha Counties. Tammy Langhoff, Katelyn’s mom, swam 307 miles (the length of Lake Michigan!) in one year, to raise awareness and capped off her feat by hosting a fundraiser at Saloon on Calhoun which raised over $10,000.
The Waukesha County Community Foundation (WCCF) is accepting letters of intent for their 2019 grants through an online submission process. Six areas are considered for support: Arts and Culture; Health and Human Services; Education; Environment and Conservation; Community Development; and Historic Preservation. Grants are not made to individuals nor for religious, governmental or political purposes and do not support capital campaigns or general operations of organizations. In addition, funding must serve the residents of Waukesha County.

“We encourage volunteer organizations, youth organizations, and other nonprofits to submit a letter of intent,” said WCCF President Shelli Marquardt. “We want to send funds back into the community through grants to support high-quality, charitable projects in Waukesha County.”

Grants range in size from $1,000 to $10,000. Grant decisions will be announced at the Giving Forward Breakfast October 30, 2019. Go to www.WaukeshaFoundation.org/grant-application/ to create an account and get started!

Waukesha County Community Foundation will be hosting the WCCF Caring Catalog, a crowdfunding campaign exclusively supporting our non-profit organizational fund holders. Our objective is to connect donors to nonprofits who are looking for end-of-year funding to reach their project or program goals. Look for the WCCF Caring Catalog from November 1 – December 20. Join us at the 4th annual Giving Forward Breakfast to learn how you can support these local charitable efforts.

Catalog submissions are limited to one per organization and are due by August 1, 2019.
130 Years of Enriching Communities.

Northern Trust is proud to support the Waukesha County Community Foundation. For 130 years, we’ve been meeting our clients’ financial needs while nurturing a culture of caring and a commitment to invest in the communities we serve. It’s all part of being a good neighbor.

FOR MORE INFORMATION CONTACT

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