

FOR THE VALLEY. FOR GOOD.

The St. Croix Valley Foundation has been helping donors create legacies of philanthropy and community impact since 1995. Today, with over \$90 million in philanthropic assets under management, we are the trusted charitable partner of the St. Croix Valley. By special arrangement with Andersen Corporation, we are honored to help Andersen shareholders utilize appreciated stock to create legacies in the St. Croix Valley – and beyond.



THE ST. CROIX VALLEY FOUNDATION & YOU MAKING COMMUNITIES STRONGER



YOU – THE DONOR

The opportunity to gift appreciated Andersen stock provides you with a unique tax-advantaged opportunity to *give back to your community*, creating a legacy that will forever support the causes that matter most to you.



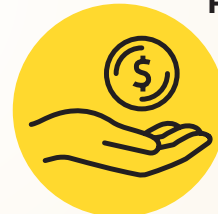
SCVF – YOUR PHILANTHROPIC PARTNER

We get to know you and work with you to best match your interests to community needs.



FULFILLING OUR SHARED MISSION

Improving the Quality of Life in the St. Croix Valley – now and for generations to come.



FUND STEWARDSHIP

Our volunteer board members and investment advisors ensure the highest levels of governance and fund management, ensuring your gifts continue to have an impact – forever.



IMPROVING THE VALLEY

SCVF maintains partnerships throughout the Valley ensuring broad knowledge of current and emerging needs. We connect donor generosity with community need.



GRANTMAKING

With gifts to unrestricted and field of interest funds, we do the work for our donors, making annual grants to nonprofit organizations engaged in the most impactful projects. If a donor wishes to be more involved with grantmaking, we can establish a new donor advised or donor designated fund.

GIVING OPTIONS

No gift is more future-focused and impactful than an **Unrestricted Gift**. Whether to a Valley-wide fund or one focused on a local affiliate community, unrestricted gifts provide the flexibility to respond to emerging needs, crisis, or unforeseen disasters.

Field of Interest Funds also provide flexibility, but within areas of focus that align with your charitable interests, such as the environment, music education, the arts, early childhood development, or health and wellness. Grants from these funds are recommended by panels of volunteer community members with expertise and experience in the area of focus, ensuring that we support nonprofit organizations best positioned for impact.

A **Donor Advised** or **Designated Fund** allows you to make grants to nonprofit organizations of personal importance, or you may consider a **Scholarship Fund** that supports local students pursuing post-secondary education.

Gifts of Andersen stock can provide significant tax advantages, as you may avoid capital gains taxes and claim a charitable deduction for the current fair market value of the stock.

(As always, we encourage you to discuss the tax implications of this gift with your financial advisor)

CREATING A LASTING LEGACY

When a gift to the St. Croix Valley Foundation is endowed, it is invested with earnings available annually for support of causes indicated by you - the donor. Endowing your gift allows for a timeline of impact that reaches generations into the future.

ENDOWED DONATION YEAR 1 : \$100,000

CUMULATIVE GRANTABLE \$	ENDING PRINCIPAL
YEAR 2	\$4,623
YEAR 5	\$18,859
YEAR 10	\$43,798
YEAR 20	\$97,851

(These numbers are based on a one-time gift of \$100,000 and a 7% annual investment return. Contact the St. Croix Valley Foundation for a full representation of the summary above.)

This chart shows how a gift of \$100,000 can, after 20 years, essentially replenish itself while simultaneously providing nearly \$100,000 in grants to the community. This Power of Endowment is the fiscal force behind philanthropic legacies that go on forever.



HEATHER LOGELIN
PRESIDENT AND CEO

"Meeting people who care about the St. Croix Valley is the best part of my job. Let's connect soon to talk about your ideas, your dreams, your legacy!"

To take full advantage of the Andersen stock donation program, contact Heather Logelin to discuss your philanthropic goals and options. You must also contact Andersen Corporation Treasury Services (800.280.2487 or TreasuryServices@AndersenCorp.com) **by December 16, 2023.**

