



### **Our WHY:**

If you believe in the **values of PD** and have a **driving ambition** to expand what's possible for women and the world they influence, then the PD Legacy Fund is an ideal way to have a high **impact on generations to come.**

Your *planned gift* **connects you to the members of the PD Legacy Society**, involving you in PD's philanthropic leadership in our community.

### **What is the PD Legacy Fund?**

The PD Charitable Fund created the Legacy Fund in 2014 to provide a vehicle for PD members to pool resources to make *significant grants* in alignment with PD's values and mission.

It receives gifts of assets when a bequest or similar estate planning contribution takes effect. It has also received cash donations, establishing a strong foundation to build upon.

The Legacy Fund is a donor advised fund (DAF), managed by the Greater Milwaukee Foundation. It can receive assets such as cash, stocks, bonds and mutual fund shares, money in IRAs and 401Ks, and more. Because it is a DAF, it gives the PDCF board the flexibility to make large, impactful grants, rather than being restricted to a 5% spending policy as endowment funds require.

The Greater Milwaukee Foundation is a community foundation founded over 100 years ago. Their community knowledge allows them to honor donors' wishes even if the organization to which a donor gives is no longer in existence. Their investment expertise has produced consistent and successful returns. These attributes give PD members confidence their estate gifts will be well managed and achieve the aims desired.

### **Who decides what is funded?**

The PDCF board of directors is responsible for determining future grant opportunities for the Fund in line with PDCF's mission to expand the self sufficiency of women and girls.

The Legacy Fund gives us the opportunity, through pooling our resources, to give at a more significant level than our individual annual giving. The fund maximizes our ability to innovate and elevate those around us.

PDCF has become a vanguard for leading change on issues such as domestic abuse, sex trafficking, racism, emotional and physical health and women's economic empowerment.

### **How do I become a member of the PD Legacy Society?**

If you would like to stay in touch with legacy fund activities, and be a part of celebrating shared generosity with other members, just let us know! By naming Professional Dimensions Charitable Fund (with designation to the PD Legacy Fund) in your will, living trust or as beneficiary of a retirement plan, life insurance or brokerage accounts you are automatically welcomed as a member in the Legacy Society. Legacy Society Members are listed on the PD Website.

For more information or to clarify your intentions call the PD office at 414-374-3570 or go to the Donation page on the PD Website.

**Join us as we unite women leaders in the pursuit of better!**

**Success!** PD Legacy Society Members have committed **\$450,000** in planned gifts to the Legacy Fund!