

Hometown Giveback
FUTURE GENERATIONS ARE COUNTING ON US

A HOMETOWN GIVEBACK PARTNER FOUNDATION

Marshfield Area Community Foundation

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The Transfer of Wealth in Wood County

Across Wood County, more than **\$1.6 billion in household wealth** is expected to move between generations over the next decade. This is known as the great transfer of wealth.

Most of us plan carefully to care for the people we love.

What if we planned with the same care for the places that raised us and the causes that shaped us?

As parents, grandparents, aunts, and uncles formalize their estate plans, they leave behind homes, savings, farms, and businesses to their heirs. If those heirs no longer live nearby, that wealth may leave Wood County for good.



HOUSEHOLDS

31,942

In Wood County today



10-YEAR TRANSFER

\$1.6 billion

By 2035



5% OF 10-YR

\$78 million

If invested back home

What We Know

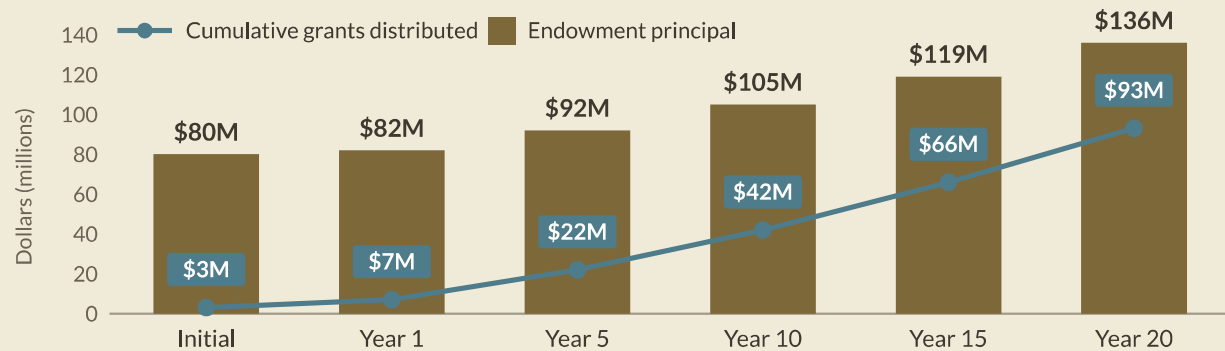
- Wood County has real wealth, and it's not just held by a handful of big estates. Every household has something worth passing on.
- When even a portion of an estate gift stays home, it helps secure a more prosperous future for Wood County.

The Opportunity

- Over the next 10 years, **\$1.6 billion** will transfer between generations in Wood County. That wealth may be held in real estate, savings, retirement accounts, and family businesses.
- If we each planned to leave 5% back home through local giving, it would put **\$78 million** to work for our nonprofits, schools, churches, green spaces, and arts and cultural causes.

What a \$78M Investment Could Become in Just the First 20 Years.

A one-time gift can help right away. But placed in a permanent endowment at Marshfield Area Community Foundation, that same gift keeps giving, year after year, indefinitely.



"The gold bars show the endowment growing even as grants go out. By year 20, the original \$78 million grows to roughly \$136 million, while distributing nearly \$93 million along the way."

“An endowment doesn't spend itself out. It goes to work, year after year, quietly building scholarships, food shelves, and parks for neighbors we may never meet. One gift becomes a hundred more. That's the kind of legacy the Marshfield area deserves, for generations to come.

— Kaelie Gomez
Executive Director, Marshfield Area Community Foundation

Simple Ways to Help Your Hometown Thrive

- 01 Contact your Community Foundation to learn more.
- 02 Talk with your advisor about your estate plans.
- 03 Give to an existing endowment, or start something new.
- 04 Spread the word. A little from all of us adds up.

Remember: What you've worked a lifetime to build can keep working for the community you love. This isn't about any one gift. It's about what becomes possible when we all invest a portion of our legacy.

One Initiative. One Shared Identity. Four Deeply Local Partners.

Marshfield Area Community Foundation ·
Incourage Community Foundation ·
Community Foundation of Central Wisconsin · Community Foundation of North Central Wisconsin

For more information contact:

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Source: University of Minnesota Extension, Transfer of Wealth Opportunity Analysis (Opatz & Winchester, 2025). Figures are inflation-adjusted, research-based estimates, not guarantees.