Hometown Giveback
FUTURE GENERATIONS ARE COUNTING ON US

A HOMETOWN GIVEBACK PARTNER FOUNDATION
Community Foundation of Central Wisconsin
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The Transfer of Wealth in Waushara County

*Across Waushara County, nearly **$480 million 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 Waushara County for good.

HOUSEHOLDS
10,333
In Waushara County today

10-YEAR TRANSFER
$479.8 million
By 2035

5% OF 10-YR
$24.3 million
If invested back home

What We Know

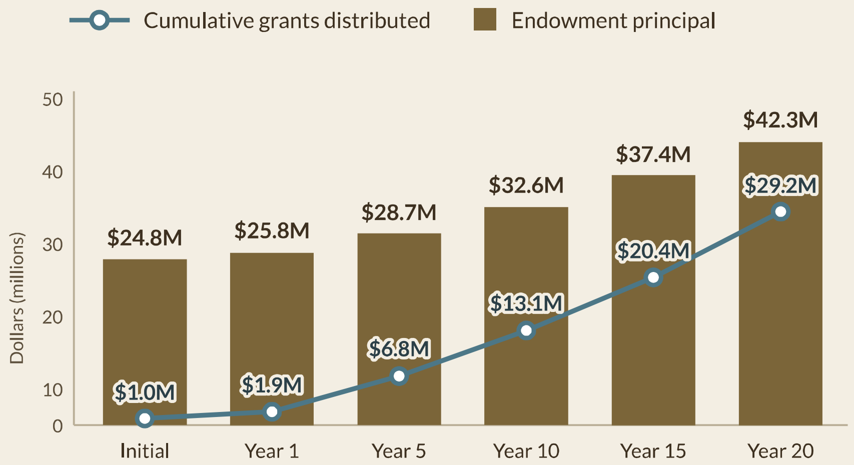
- Waushara County has real wealth, and it's not just held by a handful of big estates. Every household has something to pass on.
- When even a portion of an estate gift stays home, it helps secure a more prosperous future for Waushara County.

The Opportunity

- Over the next 10 years, **$479.8 million** will transfer between generations in Waushara 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 **$24.3 million** to work for our nonprofits, schools, churches, green spaces, and arts and cultural causes.

What a $24.3M Investment Could Become in Just the First 20 years.

A one-time gift directly to a cause can help right away. But when that same gift is placed into a permanent endowment at the Community Foundation of Central Wisconsin, it keeps giving, year after year, indefinitely. Here is what a $24.3 million endowment could look like in just the first 20 years.



"The brown bars show the endowment growing even as grants go out, because investment earnings outpace the payout rate. The teal line tracks cumulative grants to local causes. By year 20, the original $24.3 million grows to roughly $42.3 million, while still distributing nearly $29 million along the way."

"People sometimes think of an endowment as money that just sits there. It doesn't sit. It works. Every dollar keeps earning, keeps granting, keeps showing up for our schools and nonprofits year after year. It's the most patient kind of generosity I know."

— Jenny Riggenbach
CEO, Community Foundation of Central Wisconsin

Simple Ways to Help Your Hometown Thrive

01 Contact your Community Foundation to learn more about the endowment opportunity in your community.

02 Talk with your advisor about including your community in your estate plans.

03 Give to an existing endowment or start something new.

04 Spread the word. When we all give a little, our hometowns thrive.

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.

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

For more information contact: www.cfcwi.org · (715) 342-4454 · foundation@cfcwi.org

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