



Welcome to Planned Giving for Portage County!

We are an active alliance of non-profit organizations and professional advisors, all working side-by-side to promote stronger understanding and utilization of planned giving in our community. We are all working together to ensure a positive future for those around us, and we are thrilled you're considering joining us in this important effort!

We have indeed been active, our list of accomplishments by this all-volunteer force is impressive, including the following:

- Professional production of two Public Service Announcements (made possible through 100% in-kind contributions by Marx Creative), which have been aired for several years on the local network television affiliates; the audio ran for many months on radio stations in the area. Still photos were pulled from the video, and print ads were created which ran in several local publications.
- Free planned giving seminars are open to the public.
- Establishment of a Website available to all planned giving collaboratives in the region.
- Publication of a Directory of Non-Profit Organizations, designed to help advisors assist clients in selecting beneficiaries as they create estate plans.
- Publication of a Director of Professional Advisors, designed to help non-profits assist donors in selecting advisors as they create estate plans.
- Development of a strong network of professionals, united for the betterment of the Portage County.

Please consider joining us in making a difference in the future of Portage County. For more information, please don't hesitate to contact me at 715-344-4052.

Sincerely,

Kathy Davies
Chairperson