

Resource Management

Providing experienced stewardship of foundation resources.



Citizens of the New Richmond Area have relied upon the resource management expertise of the foundation to provide a simple, powerful, and highly personal approach to giving. The foundation provides a variety of giving tools to help people achieve their charitable goals – and create lasting good work in the community.

Foundation participants have entrusted their donations of time, skills and finances to the board for over thirty years. In that time the board has used its financial acumen and resource management experience to provide effective guidance and planning. The results of these efforts are found throughout the community in projects and initiatives that have helped our community to prosper.

The foundation board has member composition with strengths that compliment one another.

- Comply with IRS reporting requirements.
- Monthly financials prepared by professional staff, an annual independent CPA Review, and annually file IRS 990 report.

- Comprehensive investment policy implemented by a highly regarded Investment Manager in a well established Trust Department.
- Member of the Council on Foundations, committed to following structure and procedures set forth by National Standards. Under those standards, it operates with a high degree of competence demonstrating a commitment to meeting its legal and fiduciary responsibilities and to practicing sound stewardship of its resources.
- A member of the Donors Forum of Wisconsin.
- It has the experience, and resources to assist donors configure their gifts in the most appropriate manner.



New Richmond Area
COMMUNITY FOUNDATION
leadership • philanthropy • collaboration