ST. CROIX VALLEY FOUNDATION

PARTNER WITH US:

A Trusted Resource for You and Your Clients

As a professional advisor, you help your clients plan wisely—for their families, businesses, and legacies. When charitable giving becomes part of the conversation, the St. Croix Valley Foundation is here to support you.

We work alongside attorneys, accountants, wealth managers, and financial planners to help clients give in tax-smart, values-aligned, and community-driven ways.

Whether your client wants to make a one-time gift or create a lasting legacy, we offer flexible giving options, personalized service, and expert support to help craft the right charitable solution.

Who We Are

The St. Croix Valley Foundation is a community foundation serving six counties that border the St. Croix River—Chisago and Washington in Minnesota, and Burnett, Pierce, Polk, and St. Croix in Wisconsin.

We help people and businesses support what and where they love by partnering with nonprofits, professional advisors, and local leaders to grow generosity—and ensure every gift supports what matters most.

With both regional reach and deep local insight—through our network of local community affiliates—we offer flexible giving options, long-term stewardship, and trusted expertise to help turn your client's vision into lasting impact, close to home.

Why Partner with St. Croix Valley Foundation?

Expert Philanthropic Guidance

- 30+ years of experience in charitable giving and local and regional community impact
- More than $100 million in grants awarded since 1995
- Trusted partner in estate and philanthropic planning
- Responsive team. Local roots. No 800-numbers.
- Support at every stage—from concept to stewardship

"We know this Valley. We live here, give here, and work alongside the nonprofits your clients care about."

— Cameron Kelly, Stillwater Estate Planning Attorney & St. Croix Valley Foundation Board Member

Partner With Us - Professional Advisors

What We Offer Advisors and Their Clients

Expert Philanthropic Guidance

- Charitable planning tools and strategies tailored to each client's goals and timeline
- Deep knowledge of local nonprofits, causes, and community needs
- Collaborative approach—you stay at the center of the client relationship

Flexible Fund Options & Services

- Donor-advised funds, donor-designated funds, scholarship funds, field-of-interest funds, and more
- Private foundation alternatives or transitions
- Gift planning assistance for complex or non-cash assets (e.g., appreciated securities, real estate, IRA distributions)
- Custom gift and fund agreements

Efficient Administration & Stewardship

- Investment oversight with trusted fiduciary care
- Transparent reporting and secure online fund access for donors
- Ongoing stewardship to ensure donor intent is honored—in perpetuity

"Our goal is to make it easy for you to support your clients in achieving their charitable goals—while delivering the service and strategic insight they expect from you."
— Heather Logelin

What Sets Us Apart from Commercial Funds

- Personalized service for you and your clients
- Deep roots in the communities we serve
- No national agenda. No pressure. No product sales.
- Local investment (we bank right here in the Valley) and local stewardship
- True flexibility: your client can remain anonymous, and you stay in control

LET'S WORK TOGETHER

Let's start with a conversation. We're happy to provide a sample fund agreement, review a potential giving scenario, or brainstorm strategies for your client's charitable plan. To schedule a meeting, contact Heather Logelin at **hlogelin@scvfoundation.org** or **715-386-9490.**

Let's grow something good—together.

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