



Our communities have invested in us.
Now is the time to invest in them.

A new study* found that **\$144 million** will change hands from one generation to the next in Delaware County in the next decade. If we each set aside just 5% of our assets, over **\$7 million** would be preserved in endowments for the benefit of our county – resulting in **\$8.6 million** for Delaware communities over 20 years.

Consider your community a part of your family. You can leave an inheritance to your children and loved ones and also leave a legacy for your community.

* Winchester, Benjamin and Aiden Opatz (April 2024). *Transfer of Wealth Opportunity: State of Iowa Full Detailed Study*. University of Minnesota Extension Department of Community Development

Local Impact **LASTS FOREVER**

Vicki and Gary Spellerberg (pictured on reverse) have created their own endowment fund and direct annual payouts to area nonprofits - and their legacy will continue long after they're gone. "We hope our estate plan reflects our values of being kind, generous and involved in our community. We value our life in Delaware County and want it to thrive for future generations," says Vicki.

Why it Matters



Often, people who inherit family assets live in or move to another city and/or state. As a result, these assets leave our community.



Once these assets leave our county, they are gone forever. However, once a portion is endowed with your local community foundation, it will remain here forever.



Setting aside 5% in charitable endowment funds will have a positive impact on your community and on you, thanks to generous tax benefits.



These endowed assets will be invested and grow forever, paying out a portion of their earnings to address community issues, strengthen local institutions, and improve the quality of life for our children and grandchildren.

Ways to Invest



Real Estate



Retirement Accounts



Securities



Other Assets

The Community Foundation offers many options for investing in the place you love. Virtually any asset can be transformed into community impact.

Start today. Grow forever.



Amanda Diers, Executive Director
dbqfoundation.org/ffdc
563.880.3816
ffdc@dbqfoundation.org