

# Iowa's Transfer of Wealth

Passing Down Prosperity



## Our Endowment

The Community Foundation of Jackson County is uniquely positioned to improve quality of life through grantmaking, collaborating with local leaders, and building endowment funds. We invite you to help ensure our county's strong future by making a gift to the Community Foundation of Jackson County endowment fund. If we preserve just 5% of the estimated wealth transfer for our county, in 30 years, the fund could generate an estimated \$5.3 million annually for community projects and priorities, forever.

## Learn More

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## Make an impact in your community

### TODAY.

Many of our community partners are building the Community Foundation of Jackson County endowment fund by making gifts now. Because the Foundation is a public charity, these donors will receive maximum tax benefits.

### TOMORROW.

You can leave a lasting legacy for your family and community with a planned gift from your estate or by designating the Community Foundation as a beneficiary of your insurance policies or retirement assets. These are easy ways to make a meaningful charitable gift while reserving choice assets for heirs. We work with you or your professional advisor to discuss the giving options that will make tax time more rewarding — for you and your community.

### FOREVER.

Our community's long-term well-being is at the heart of our work. Our endowment funds are invested permanently, and the earnings provide annual funding for organizations to make a positive impact. We depend on these funds to make grants that address pressing needs and important opportunities in our community — even as they change over time.

We offer many ways for individuals and organizations to create and build endowments that address an array of issues. Ask us how!

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## IN JACKSON COUNTY...



**\$3.2 billion**

Is expected to transfer, through 2049, from one generation to the next via probate estates\*



**\$160 million**

Could be secured forever if just 5% of the expected transfer is invested in an endowment



**\$6.8 million**

Could be available annually for community projects and priorities\*\*

\*Iowa State University Extension and Outreach study

\*\*Using a 4.25% grant payout

## THE POWER OF GIVING TOGETHER

Since World War II, Americans have created, invested and multiplied unprecedented private wealth. Much of this wealth is currently invested in family homes and farms, retirement accounts, and other appreciated assets. Over the next 30 years, this capital — estimated at \$53 trillion — will change hands. Most will go to heirs (and taxes), but you can preserve a portion as your legacy for the community's future.

The research in this document estimates our local anticipated wealth transfer. Retaining a slice of that wealth for philanthropy as it transfers generations is a historic opportunity for strengthening Jackson County. By working with our expert team to plan your charitable giving to the Foundation, you can help ensure a strong future for our county — forever.