



Mike and Judy McCoy

# Your Personalized Approach to Giving

## Donor-Advised Funds

**“When we were young, we had a lot of people in our lives who were really good to us,” say Mike and Judy McCoy.**

As the family business became increasingly successful, the couple knew they wanted to pass along the kindness they’d been shown. The McCoy’s learned about the benefits of creating a donor-advised fund, which they did through the Community Foundation.

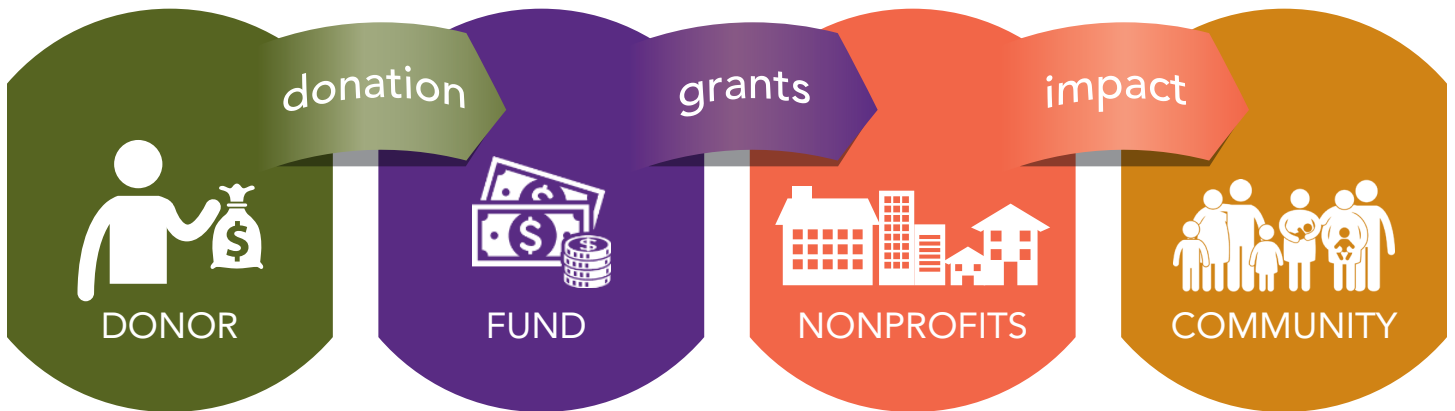
“Coming to the Community Foundation has been a great experience for us, and it makes us feel good,” says Mike.

## HOW IT WORKS

**1** You make a gift to the Community Foundation. You can give cash, appreciated stocks, real estate or other assets. You receive tax benefits in the year your gift is made. You may make subsequent gifts as often as you like.

**2** We set up a fund in your name, in the name of your family or business, or in honor of any person or organization you choose. If you create an endowed fund, your gift is a permanent source of sustainability for the community.

**3** You recommend uses for the fund. We handle all the administrative details and issue grants to nonprofits in the name of the fund.



### MORE ABOUT DONATIONS

- You receive tax benefits the year the gift is made.
- If your fund is endowed, you receive the Endow Iowa 25% State Tax Credit.
- You receive an annual payout letter.
- We provide charitable contribution tax documents and send quarterly fund statements.

### MORE ABOUT GRANTS

- You may request grants to one or many nonprofits at any time.
- We can recommend organizations working on causes you care about most.
- We verify eligibility of each recipient, then generate and send grant checks.

## Meet Your Team



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