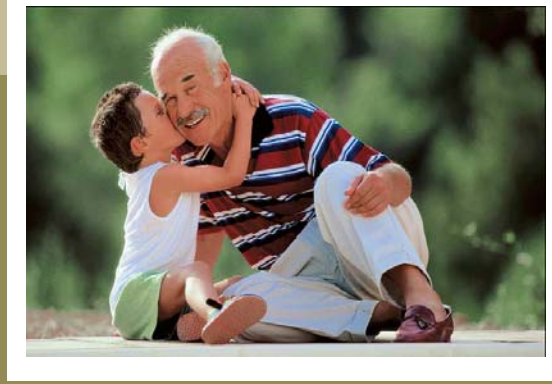


## Charitable Instruments

A variety of giving methods tailored to your unique situation.



**Outright Gift.** You can make a gift of cash, stocks, bonds, real estate, or other assets to the Story County Community Foundation (SCCF). Your gift qualifies for maximum charitable benefit under state and federal law.

**Beneficiary.** You can make SCCF the beneficiary of a percentage of your retirement account or a life insurance policy.

**Bequest.** You can designate a gift or portion of your estate to the SCCF and, in some cases, receive a substantial reduction in federal gift and estate taxes.

**Gift Annuity.** You can make a gift of cash or property to the Story County Community Foundation now, get immediate tax benefits, and ensure that you or a loved one receives fixed quarterly or annual income payments for life.

**Charitable Remainder Trust.** You can place cash or property in a trust that pays annual income to you (or another named beneficiary) for life. After your death, the remainder of the trust transfers to the SCCF and is placed in a charitable fund you've selected. You receive income tax benefits the year you establish your trust.

**Charitable Lead Trust.** You can place cash or property in a trust that pays a fixed amount to the SCCF for the number of years you select. Once this period ends, the assets held by the trust are transferred to the beneficiaries you name. In some cases, you receive a substantial reduction in federal gift and estate taxes.

You receive personalized service.

Each individual, family, or organization we work with has unique charitable interests... and unique financial circumstances. We help you make the most of both, so you receive the greatest return on your community investment.

*Story County Community Foundation is an affiliate of the Community Foundation of Greater Des Moines, an Iowa nonprofit located at 1915 Grand Avenue, Des Moines, Iowa. This publication is for general purposes only and is not intended as legal or financial advice. Story County Community Foundation recommends that each person considering a planned gift consult with her or his own legal or financial advisor.*

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