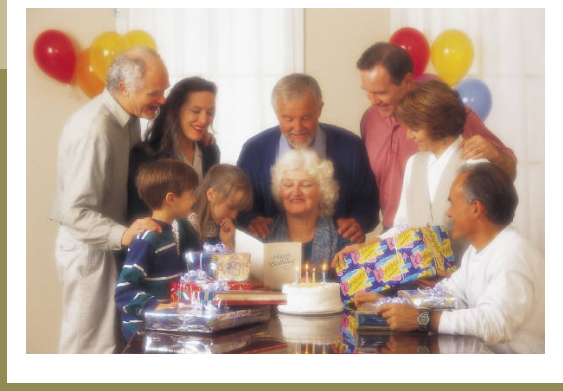


Helping your family build a tradition of giving

Donor Advised Fund



Opening a Donor Advised Fund allows your family to make a gift to the Story County Community Foundation and then remain actively involved in suggesting uses for your gift.

How it works

- You and/or your family make a gift to the Story County Community Foundation—you can give cash, appreciated stocks, real estate, life insurance, or other assets.
- Working with our affiliate, the Community Foundation of Greater Des Moines, SCCF sets up a special fund in the name of your choice.
- Donors receive tax benefits in the year their gift is made.
The donor may be eligible to receive a state of Iowa tax credit equal to 25% of the amount of the donation in addition to the normal federal charitable deductions.
- You recommend uses for the fund to support the charitable causes and organizations you care about most.
- Your recommendations are sent to the Community Foundation of Greater Des Moines for approval and distribution.
- We handle all the administrative details and issue grants to charities in the name of the fund you establish (if you prefer, grants can be made anonymously). You can present the check if you would prefer.
- Your gift may be placed into an endowment that is invested over time. Each year, you are able to recommend how up to 5% of the fund balance is granted to address community needs. The earnings from your current and future gifts to the fund provide a permanent source of community capital, helping do good work today and in the future.

Sharing family values

“We wanted to share our community values with our children and share our family values with our community,” says Sara Lin, explaining why she and her husband Peter established the Lin Donor Advised Fund at their local community foundation. Every year, the Lins and their children meet with community foundation staff to recommend uses of the fund. Two years ago, they recommended that it be used to help start an inner-city daycare center. Last year, the fund helped expand the hours of this center, in addition to supporting an area arts camp. “We look forward to a day when we might involve our children’s children in giving back,” says Sara.

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 gift consult with her or his own legal or financial advisor.

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