As engaged members of the Ames community for forty-five years, Kay and Roger Berger have left their mark on the community in a number of ways. When it came time to decide how best to invest in the causes Kay and Roger cared about, they and their financial adviser agreed working with the Story County Community Foundation would allow them to ensure their charitable interests would be maintained long-term.

“The Story County Community Foundation staff listened to our goals, asked the right questions, and helped us come up with straight-forward solutions,” Roger says. “The tax incentives for donating appreciated stock and receiving Endow Iowa tax credits, as well as the ease of the process, were nice bonuses.” Together Kay and Roger created two endowments:

- **Friends of Ada Hayden Heritage Park Endowment** — Kay is a founding member of the public-private partnership that turned an old sand and gravel mine in north Ames into a 437-acre natural park extensively used by the community. “We were happy to provide the initial gift to start a permanent agency fund to provide future support for the park. But, we were especially excited when other people chose to contribute. The endowment has grown to such an extent that the yearly endowment distributions can support new initiatives for the park,” says Kay.

- **Kay and Roger Berger Endowment** — Roger, a self-professed “saver,” thinks of their donor advised fund as another form of a savings account. Currently the Bergers use their endowment to make charitable gifts of their choosing. Per their wishes, future distributions will increase funding available for the Story County Community Foundation’s annual competitive grants process extending the impact of their gift for generations.

Kay and Roger Berger provided the initial gift to start a permanent endowment to provide future support for the Ada Hayden Heritage Park.

**Berger’s endowment creates legacy to support their favorite causes**

**AGENCY FUND:** Nonprofit organizations establish an endowed fund for permanent future income for their activities.

**DONOR ADVISED FUND:** Families or individuals establish a fund to provide flexibility about where to make charitable gifts each year.