

COMMITTEE ADVISED FUNDS



Committee advised funds are established by groups, organizations or businesses who want to come together to make grants to causes they care about. A committee, as determined by the group or organization, identifies the causes it wishes to support and collectively determines where the funds will be directed. Grants can be distributed from fund income, principal or both.

Committee Advised Funds Are:

Distinct

- A committee advised fund can be established in the name of your organization.

Enduring

- Members of your organization will make grants from your fund now and in the future.

Flexible

- You can make contributions to your fund at any time. The Community Foundation can facilitate a variety of gift types including cash, stock and real estate.

Efficient

- Your organization receives tax benefits on gifts to the fund, including the possibility of a 25% state tax credit through the Endow Iowa Tax Credit program, while the Community Foundation handles the administrative details.

Financial Facts:

- A committee advised fund can be established in any amount.
- You can grow your charitable assets as your fund is combined with other Community Foundation funds into professionally managed portfolios allowing greater diversification of investment and access to investment vehicles.
- Each fund is charged an administrative fee based on the type and size of investment.

Bringing the community together to make an impact.

The Story County Community Foundation serves as a partner alongside groups, organizations or businesses who want to come together to make an impact through individual grantmaking that represents their community impact priorities.

The *Story County Community Giving Circle* is a group of community members invested in making a difference in Ames and Story County through shared values, shared resources and shared interest in supporting local organizations

“We were inspired to start a giving circle in Story County having read about the success of giving circles in other communities. We felt like we knew a lot of people in the community that support many different organizations and we wanted to bring a pool of people together to share about their passions.” – Kacy Bass, Story County Community Giving Circle Co-Founder.



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Ten reasons to give through the Story County Community Foundation

- 1** We are a **local organization** with deep roots in the community.
- 2** We have **broad expertise** on community issues and needs.
- 3** We provide highly **personalized service** tailored to your charitable and financial interests.
- 4** Our funds help people **invest in causes** they care about most.
- 5** We accept a wide **variety of assets**, and can facilitate the most complex forms of giving.
- 6** We partner with **professional advisors** to create highly effective approaches to charitable giving.
- 7** We offer maximum **tax advantage** for most gifts under state and federal law including exclusive access to Endow Iowa Tax Credits, a 25% tax credit on qualifying gifts.
- 8** We **multiply the impact** of gift dollars by pooling them with other gifts and grants in professionally managed portfolios.
- 9** We build **endowment funds** that benefit the community forever and help create personal legacies.
- 10** We are a collaborative **community leader**, coordinating resources to create positive change.

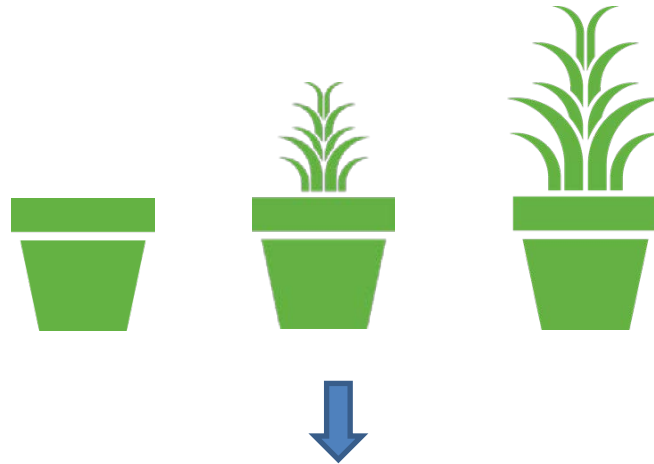
SUPPORT

Support from your donors to your agency endowment fund at the Story County Community Foundation provides sustainable support for your organization in tax-wise ways.



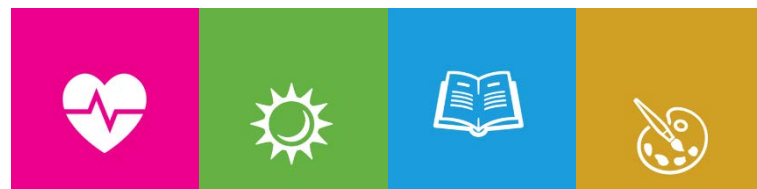
GROW

Grow the assets of your fund through a professionally managed and invested portfolio of your choice.



ACT

The investment income from your fund is distributed annually to provide sustainable support for the mission of your organization.



For more information about establishing a fund at the Story County Community Foundation call 515-232-9200

The Story County Community Foundation is an affiliate of the Community Foundation of Greater Des Moines.