

DESIGNATED FUNDS

Designated funds simplify charitable giving. You set your charitable vision and we ensure your charitable legacy is fulfilled for generations to come. Fund advisors preset the gift amount, the causes to support and the timing of the gift to provide an annual means of sustainable funding to the organizations they have selected.

Designated Funds Are:

Personal

- Designated funds can be established in honor or in memory of a loved one. They can also be named to recognize your family.

Enduring

- By providing annual support through a designated fund you are making continual impact through sustainable support for the charity of your choice.

Flexible

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

Efficient

- You benefit from the most advantageous tax treatment for a charitable gift, and the Community Foundation handles the administrative details.

Financial Facts:

- A designated 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. This allows greater diversification of investments and access to investment vehicles.
- Each fund is charged an administrative fee based on the type and size of investment.



416 Douglas Avenue, Suite 202
P.O. Box 1666
Ames, Iowa 50010
www.storycountyfoundation.org

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 Credit, 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.

GIVE

Give to your fund and receive a tax deduction.



PLAN

Identify the charitable passion you want to support today and for generations to come.



GRANT

Annual grants will be made to the charities you have selected to provide continual impact and sustainable support.



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.