

# Generosity That Lives On

If you've always supported your favorite charity—or always wanted to—a planned gift to the Community Foundation of Northeast Iowa can help you award grants to the causes you care about forever.

## What matters to you?

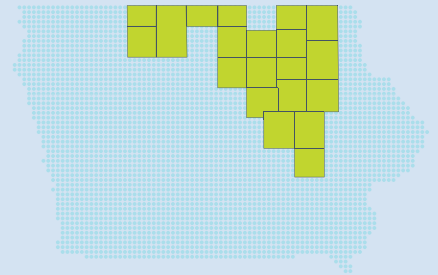
Think about what matters to you. Of course you care about the needs of your loved ones, but what about your community and causes you support or have always wanted to support?

When working with your professional advisor, such as an attorney or financial planner, to meet your financial goals, having this type of conversation can pave the way for a plan that meets both your personal and charitable goals. And, by working with the Community Foundation of Northeast Iowa, you can create a financial roadmap that supports your charitable interests forever.

**Charitable giving is not just for the wealthy. With a little planning, anyone can make a gift that impacts their community forever, takes advantage of tax benefits, and preserves financial security for themselves and loved ones.**

**Getting started is easy.** Contact CFNEIA's Development staff at 319-287-9106 or [info@cfneia.org](mailto:info@cfneia.org) to discuss how you can start planning today to support your favorite charity forever.

## A local legacy



The Community Foundation of Northeast Iowa is your partner in creating a legacy for your community. We can help you create a plan that makes a difference for the place you love – forever. Our endowments are a trustworthy tool to ensure your long-term local giving anywhere in our 20-county region.

## Recognition Today Through the Legacy Society

By notifying the Community Foundation of your plans to leave a charitable gift through the Foundation, you will become a member of the Legacy Society, which was created to recognize today those who plan to make a substantial gift later.

Go to [cfneia.org/legacy](http://cfneia.org/legacy) for more information.

# Making a Charitable Plan

Making a difference for the causes you care about is easy. The first step is deciding you want to leave a legacy of good for your community. Once you make that decision, the Community Foundation can help guide you the rest of the way.

**1. Talk to your advisor.** The Community Foundation of Northeast Iowa recommends you discuss your plan to leave a charitable planned gift with your attorney or financial advisor. They can help you incorporate your gift into your personal financial plans.

**2. Meet with us.** Foundation staff have in-depth knowledge of nonprofits in the communities we serve. We help you identify options that support your passion, and create a plan to meet your charitable wishes, supporting the cause or causes you care about most, forever.

**3. Document your intent.** By signing a simple, non-legally binding memorandum of understanding, you acknowledge your wishes to leave a charitable gift through the Community Foundation. Having your donor intent in writing assures we can best carry out your wishes and recognize you accordingly.



## Barbara and Bill Clark

### Barbara and Bill Clark Fund

The Clarks established the Barbara and Bill Clark Fund during their lifetime, recommending grants to nonprofits they loved that created a stronger Cedar Valley. The couple, who met in 1951 while Bill was at Harvard University in Cambridge, Massachusetts and moved back to Bill's home of Waterloo in 1952, had a vision of generosity that exceeded their lifetimes.

When Barbara passed away in 2009, preceded in death by Bill in 2005, the Barbara and Bill Clark Fund became an unrestricted fund, adding more grant funds to the Black Hawk County discretionary grant process. The generous couple had great faith in the Community Foundation, which Bill believed was, "One of the greatest assets in the Cedar Valley."

Today, the couple's legacy lives on through their endowed fund which supports CFNEIA grantmaking to organizations making Black Hawk County stronger for all people.

## Types of Planned Gifts

There are many ways to support the causes you care about through a planned gift. These are a few common methods.

CFNEIA always recommends discussing options with your advisor to find the right giving option for you and your family.

### Charitable Gift in Your Will

### IRA Beneficiary

### Charitable Remainder Trust

### Charitable Gift Annuity

### Life Insurance Beneficiary

## ABOUT THE COMMUNITY FOUNDATION OF NORTHEAST IOWA

Since 1956, CFNEIA has been a catalyst for positive community change. We do this by supporting nonprofits doing the most good and by helping people who want to do good leave a legacy for their community and the causes they care about. Today, our region includes 20 Iowa counties, and we are proud to partner with our local community foundations in creating vibrant communities.