

## Charitable Instruments

A variety of giving methods tailored to your unique situation.



**Outright Gift.** You can make a gift of cash, stocks, bonds, real estate, or other assets to your community foundation. Your charitable gift qualifies for tax advantage under Iowa and federal law.

**Bequest by Will.** You can designate a gift or portion of your estate to your community foundation and, in some cases, receive a substantial reduction in federal gift and estate taxes.

**Charitable Gift Annuity.** You can make a gift of cash or property to your community foundation now, get immediate tax benefits, and ensure that you or a loved one receive fixed quarterly or annual income payments for life.

**Charitable Remainder Trust.** You can place cash or property in a trust that pays annual income to you (or another named beneficiary) for life. After your death, the remainder of the trust transfers to your community foundation and is placed into a charitable fund you have selected. You receive income tax benefits the year you establish your trust.

**Charitable Lead Trust.** You can place cash or property into a trust that pays a fixed amount to your community foundation for the number of years you select. Once this period ends, the assets held by the trust are transferred to the beneficiaries you name. In some cases, you receive a substantial reduction in federal gift and estate taxes.

**Beneficiary Designation.** You can make the community foundation a full or partial beneficiary of your life insurance policy or retirement account (401(k) or IRA). It's an easy way to make a legacy gift without modifying your estate plan. Upon your death, your gift is placed into the charitable fund of your choosing.

### You receive personalized service

Each individual, family, or organization we work with has unique charitable interests... and unique financial circumstances. We help you make the most of both, so you receive the greatest return on your community investment.

## Mahaska County Community Foundation

Building a firm foundation for the future

FOR MORE INFORMATION:

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