

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?

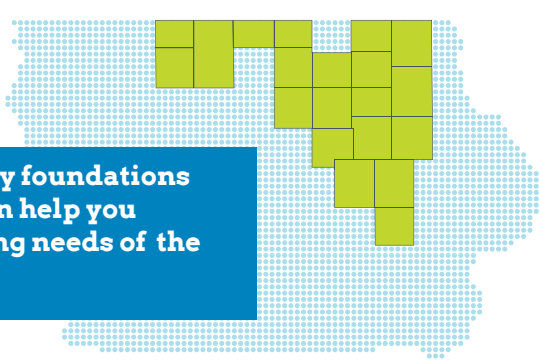
When working with your professional advisor, such as an attorney or financial planner, to meet your financial goals, having this type of conversation can pave the way for a plan that meets both your personal and charitable goals. And, by working with the Community Foundation of Northeast Iowa, you can 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 to discuss how you can start planning today to support your favorite charity forever. You can also find planning tools, including calculators, financial news, and a complimentary wills planner at cfneialeadership.org.

"We have been so richly blessed, and we want to give back by supporting the local nonprofits making where we live a better place. Establishing a planned gift through our estate allows us to support our community in a way that aligns with our values and creates a legacy of good."

BOB AND JUDY BROWN
Legacy Society Members



CFNEIA and our affiliate community foundations impact 20 Iowa counties, and we can help you leave a legacy that meets the growing needs of the community and causes you love.

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.

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

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 for more information.



Robert "Bob" and Elizabeth "Betty" McCoy credited a blind date for the start of a lifetime of love for family and community.

Bob, a WWII veteran and Waterloo, Iowa native, met Betty in her hometown of Madison, Wisconsin where he had graduated college. For 47 years of marriage, the couple lived in Waterloo, raising their children and nurturing the community through volunteer efforts with many charitable causes. Their loyalty and love of community made it a better place, not only for their children, but for everyone.

Bob and Betty also understood the importance of giving back to the community after their lifetime, and worked with the Community Foundation of Northeast Iowa to leave a permanent legacy for the community they loved. In 1994, they established a Charitable Remainder Trust naming the Community Foundation as beneficiary.

Bob passed away in April, 2000, and after Betty's death in January, 2016, the Robert J. and Elizabeth G. McCoy Endowment Fund was established to benefit charities in their hometown.

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 24 affiliate community foundations in creating vibrant communities.



Excellence. Accountability. Impact.™

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