Live here. Give here.

The power of giving together
Surprising wealth: Illinois

Pike County, Illinois

$1.41 billion county-wide

$209,000 per household
Surprising wealth transfer in next 50 years

$53 trillion in United States

$1.36 trillion in Illinois

$1.68 billion in Pike County

$249,000 per household in Pike County
For generations, people lived entire lives close to their birthplace.

Generally wealth passed from generation to generation, but stayed local.
Many of the next generation no longer live in our county

Once the wealth leaves our community, it will never return
PASSING WEALTH FROM ONE GENERATION TO THE NEXT

Three beneficiaries

Heirs

Taxes

Community
Invest 5% of our wealth as a legacy for future generations

Secure the Future
Pike County Endowment Fund

5% for future generations

$12 million in 10 years

$84 million in 50 years
The next 10 to 20 years

Critical to the county’s future

Opportunity to retain 5% of the county’s wealth for future generations
Two possible scenarios

The county has a robust endowment and a secure future; or,

The county’s wealth has been transferred to communities in California, Arizona, Texas and beyond.
Give a gift for the future

You’ve lived here
You’ve worked here
This county has been good to you
The Smiths

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>$150,000</td>
</tr>
<tr>
<td>Retirement assets</td>
<td>$100,000</td>
</tr>
<tr>
<td>Savings and investments</td>
<td>$100,000</td>
</tr>
<tr>
<td>Life insurance policies</td>
<td>$50,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$400,000</strong></td>
</tr>
</tbody>
</table>

**5% plan** → **$20,000**
YEAR 1
Establish your Family Fund

$100,000 gift

YEAR 15
$100,000 in cumulative grants and services
$158,000 balance

YEAR 25
$200,000 in cumulative grants and services
$213,000 balance

YEAR 50
$625,000 in cumulative grants and services
$455,000 balance

LOOKING AHEAD

One gift, many generations

assumes 5% annual payout and 8.5% rate of return
If 5% of estates transfer for the Pike County Endowment Fund to the Community Foundation. . .

<table>
<thead>
<tr>
<th>YEAR 10</th>
<th>YEAR 50</th>
</tr>
</thead>
<tbody>
<tr>
<td>$12 million charitable gifts</td>
<td>$84 million charitable gifts</td>
</tr>
<tr>
<td>$3 million total grants</td>
<td>$177 million total grants</td>
</tr>
<tr>
<td>$14 million community endowment</td>
<td>$184 million community endowment</td>
</tr>
</tbody>
</table>

LOOKING AHEAD

Many gifts, many generations
Remember your heirs and tax obligations
Give to your community for good… forever
The payoff

Permanent legacy for donor
Source of pride for heirs
Stronger community for all
Permanent legacy

Endowed named fund
Targeting causes you care about most
Grants awarded in the name of your fund for generations to come
Source of pride

Give back to your community

Model values for the next generation

Honor family heritage
SECURING OUR FUTURE

Stronger community

Causes that move you

Enrich education · Safeguard health · Improve neighborhoods · Cultivate arts · Protect environment · Strengthen families
Charities that touch your life

Option to designate a local nonprofit

What touches your heart?
Ever-changing opportunities and needs

County Endowment Fund

Together, we can grow a permanent endowment that is flexible and relevant through changing times. We can build security and prosperity for future generations.
GIVE THROUGH YOUR COMMUNITY FOUNDATION

The power of giving together.

Securing the Future: Leaders

Will you step forward to secure your county’s future?
We accept a wide variety of assets.

Securing the Future: Options

- Outright Gifts
- Bequest by Will
- Beneficiary Designation
- Charitable Gift Annuity
- Charitable Remainder Trust
- Charitable Lead Trust
- Life Estate Contract
Three easy giving strategies

Give highly appreciated assets during your lifetime

Give retirement assets through your estate

Designate the Community Foundation as an insurance policy or retirement account beneficiary
Secure your county’s future **today**

- Assess your estate value
- Determine what to leave loved ones and heirs
- Calculate a percentage for your community
- Determine most advantageous asset to give
Everyone can be a philanthropist.
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