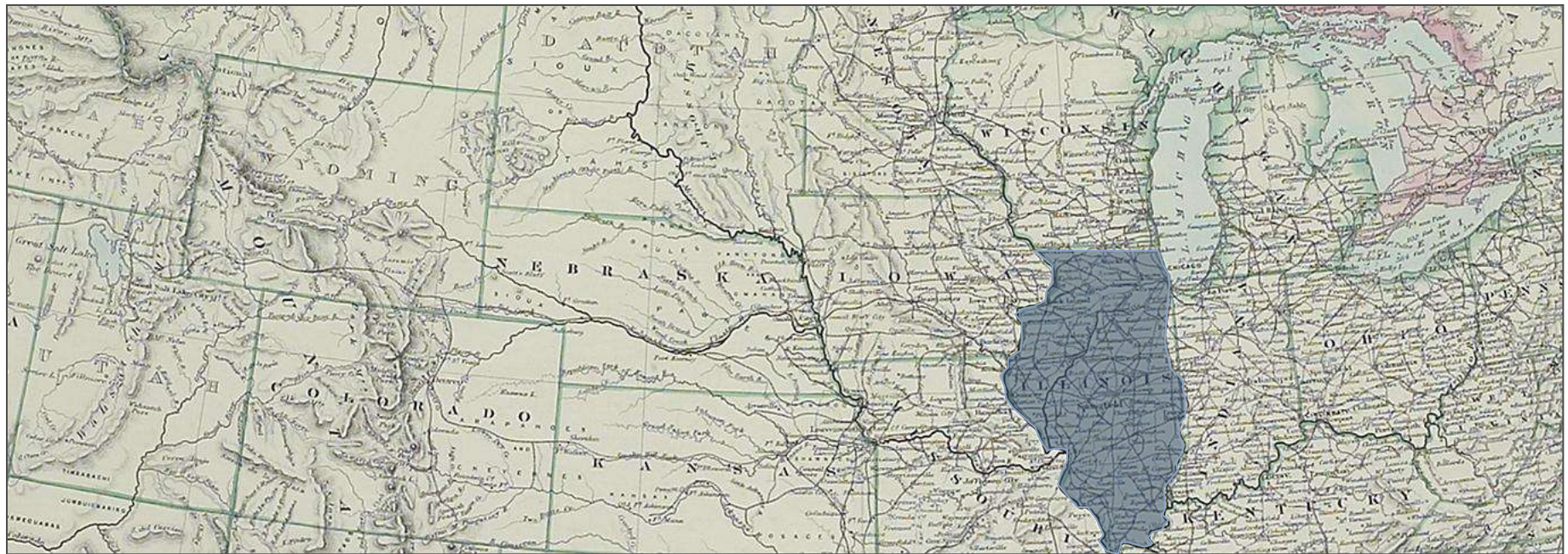


# Live here. Give here.

*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



## COMMUNITY WEALTH

# Yesterday

- For generations, people lived entire lives close to their birthplace
- Generally wealth passed from generation to generation, but stayed local



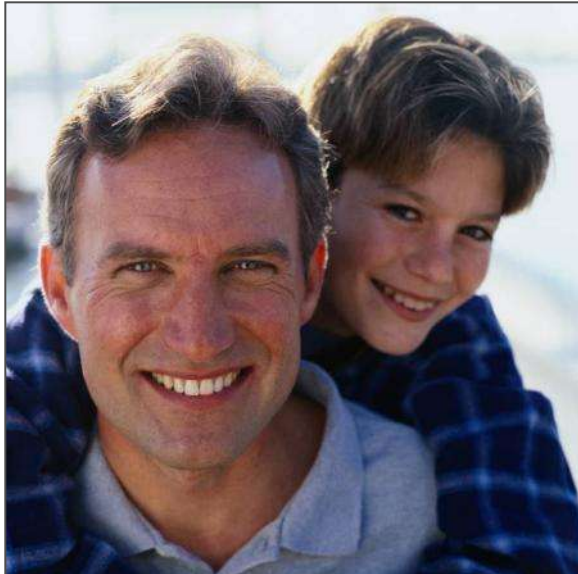
## COMMUNITY WEALTH

**Today**

- 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



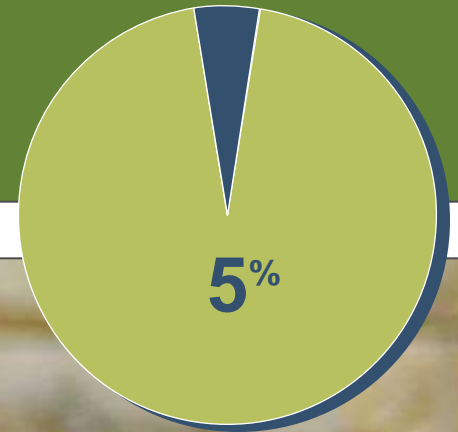
Community



LIVE HERE. GIVE HERE. INCREASE OUR COMMUNITY'S SHARE.

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



LOOKING AHEAD

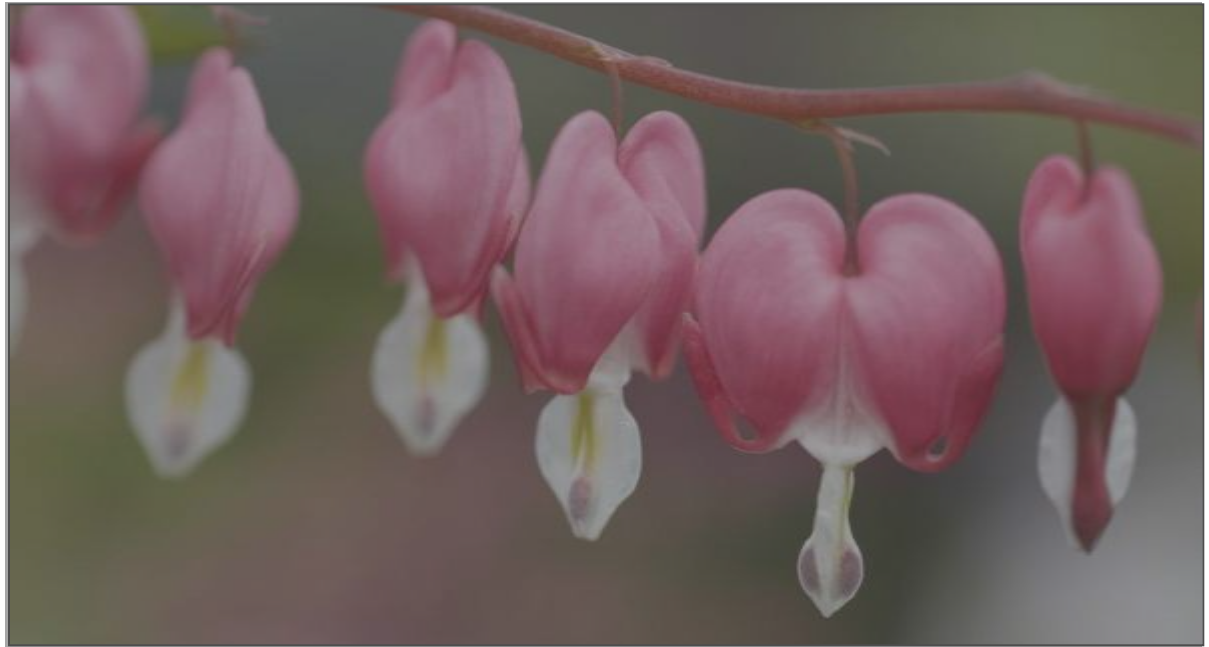


## The next 10 to 20 years

Critical to the county's future

Opportunity to retain 5% of the county's wealth for future generations

LOOKING AHEAD



## 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.

LOOKING AHEAD



## Give a gift for the future

You've lived here

You've worked here

This county has been good to you



## SECURING OUR FUTURE

### The Smiths



Home	\$150,000
Retirement assets	\$100,000
Savings and investments	\$100,000
Life insurance policies	\$50,000
<hr/>	
Total	\$400,000
<hr/>	
5% plan	→ \$20,000

## YEAR 1

Establish your  
**Family Fund**

**\$100,000** gift

Initial gift has  
been invested:

## YEAR 15

**\$100,000** in  
cumulative grants  
and services

**\$158,000** balance



1 TIME

## YEAR 25

**\$200,000** in  
cumulative grants  
and services

**\$213,000** balance



2 TIMES

## YEAR 50

**\$625,000** in  
cumulative grants  
and services

**\$455,000** balance



6+ TIMES

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. . .**



<b>YEAR 10</b>	<b>YEAR 50</b>
<b>\$12 million</b> charitable gifts	<b>\$84 million</b> charitable gifts
<b>\$3 million</b> total grants	<b>\$177 million</b> total grants
<b>\$14 million</b> community endowment	<b>\$184 million</b> community endowment

LOOKING AHEAD

**Many gifts, many generations**



LIVE HERE. GIVE HERE.

## The plan: Securing Your County's Future

Remember your heirs and tax obligations

Give to your community for good... forever



SECURING OUR FUTURE

# The payoff

**Permanent legacy** for donor

**Source of pride** for heirs

**Stronger community** for all



SECURING OUR FUTURE

# Permanent legacy



Endowed named fund

Targeting causes you care about most

Grants awarded in the name of your fund  
for generations to come



SECURING OUR FUTURE

## 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**

GIVE THROUGH YOUR COMMUNITY FOUNDATION

# Charities that touch your life

Option to designate a local nonprofit

**What touches your heart?**



GIVE THROUGH YOUR COMMUNITY FOUNDATION

# 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?

GIVE THROUGH YOUR COMMUNITY FOUNDATION

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

GIVE THROUGH YOUR COMMUNITY FOUNDATION

## 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



LIVE HERE. GIVE HERE.

## 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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