Dyersville Area
Community Foundation
An affiliate of the Community Foundation of Greater Dubuque

5% INVESTED FOREVER

Our communities have invested in us.
Now is the time to invest in them.

A new study* found that **$923 million** will change hands from one generation to the next in Dubuque County in the next decade. If we each set aside just 5% of our assets, over **$46 million** would be preserved in endowments for the benefit of our county – resulting in **$55 million** for Dubuque County communities over 20 years.

Consider your community a part of your family. You can leave an inheritence to your children and loved ones and also leave a legacy for your community.

** Winchester, Benjamin and Aiden Opatz (April 2024). Transfer of Wealth Opportunity: State of Iowa Full Detailed Study. University of Minnesota Extension Department of Community Development*

Local Impact **LASTS FOREVER**

Mary Ungs-Sogaard and her husband, Jens, met with charitable estate planner Johni Hayes - a complimentary service provided to Community Foundation partners. "We had plans to update our will, so it worked well to help us define our goals before meeting with our lawyer. I would recommend this process at any stage in one's life, to be able to clarify your values and put on paper your life plans," she says.

Why it Matters

Often, people who inherit family assets live in or move to another city and/or state. As a result, these assets leave our community.

Once these assets leave our county, they are gone forever. However, once a portion is endowed with the Community Foundation, it will remain here forever.

Setting aside 5% in charitable endowment funds will have a positive impact on your community and on you, thanks to generous tax benefits.

These endowed assets will be invested and grow forever, paying out a portion of their earnings to address community issues, strengthen local institutions, and improve the quality of life for our children and grandchildren.

Ways to Invest

Real Estate

Retirement Accounts

Securities

Other Assets

The Foundation offers many options for investing in the place you love. Virtually any asset can be transformed into community impact.

Start today. Grow forever.

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