

Creating Your Legacy with the Iowa CareGivers

When you create a planned gift for causes important to you such as the Iowa CareGivers, you make a statement about what you want your legacy to be: Will you enable tomorrow's direct care workers to earn a living wage? Will you make it possible for greater numbers of people to enter the profession — and remain there? Will growing the supportive environment for caregivers to provide the very best care to those who need it be the vision you help realize?

The Iowa CareGivers can help you to leave a legacy that ensures our direct care workforce is able to do the work they love for those we love.

As you plan for your future, and that of your loved ones, a deferred gift can continue to benefit others in ways that are important to you and your family. While charitable gifts are motivated foremost by the desire to support a charitable organization such as the Iowa CareGivers, tax rewards can also be important, allowing you to experience personal benefits beyond the fulfillment of shaping the future of the direct care workforce.

Deferred giving enables you to arrange charitable contributions in a manner that maximizes your personal and financial goals. Making a bequest in your will is one of the easiest and most popular deferred gifts available to you. And, when you combine a planned gift with current giving, you gain the added satisfaction of seeing your gifts at work now, while knowing your ability to make a difference in the lives of direct care workers will have an impact beyond your lifetime.

You may name the Iowa CareGivers as a percentage beneficiary, for a specific dollar amount, or for specific assets — such as stocks — that can then be designated to support the Iowa CareGivers for the purposes you have documented. Suggested wording for making a bequest provision is provided below for your convenience.

MAKING YOUR PRIORITIES KNOWN

Once you have decided the planned gifting arrangement that is best for you, the Iowa CareGivers asks you to provide a Statement of Intent, which is just as it sounds: a one-page, non-legally binding agreement that enables us to understand your charitable wishes and to most faithfully carry them out one day.

In addition to establishing the means for making a generous future gift to support the Iowa CareGivers, the Statement of Intent can serve as an excellent planning tool for you and your family, along with your financial advisor or attorney. And, should your financial circumstances change in the future, your commitment is revocable and can be modified at any time.

In the Statement of Intent, you are asked to provide a description of your future gift to the Iowa CareGivers and an estimate of the gift's value in today's dollars. This information ensures we understand how you intend the funds to be administered and distributed upon realization. Recognizing that estate gifts will fluctuate over time due to many factors, you are simply providing your "best guess" of the amount you anticipate transferring to the Iowa CareGivers as determined in consultation with your financial advisor, as needed.

The Purpose Section allows you to designate your gift for a specific purpose, such as direct care workers educational resources or training, advocacy efforts on their behalf, or to conduct research that informs policy and programming. The Iowa CareGivers can assist you in shaping your future gift to create the maximum impact in those areas you care most about.



The go-to place for those in direct care

SECURING THE FUTURE — FOR YOU AND YOUR FAMILY, AND FOR OUR DIRECT CARE WORKFORCE

As you coordinate your financial, estate and gift planning, the strategic use of these assets could allow you not only to secure your future and that of your loved ones, but also create lasting impact for the future of Iowa's direct care workers. By making a planned gift arrangement through the Iowa CareGivers, you ensure that which you care most continues to make a difference well beyond our own lifetimes.

The Iowa CareGivers (federal tax ID 42-1457592) is an Iowa nonprofit corporation exempted from federal income taxation as a section 501(c)(3) publicly supported charity.

SAMPLE BEQUEST LANGUAGE

For an unrestricted gift that allows the Iowa CareGivers to determine how to use the funds based on the most pressing needs, use the following language for your will and/or trust:

"I give to the Iowa CareGivers, a nonprofit corporation currently located at 939 Office Park Rd., Ste. 332, West Des Moines, Iowa 50265, or its successor thereto, _____ [written amount or percentage of the estate or description of property] for its unrestricted charitable use and purpose."

To designate your provision for a particular purpose:

"I give to the Iowa CareGivers, a nonprofit corporation currently located at 939 Office Park Rd., Ste. 332, West Des Moines, Iowa 50265, or its successor thereto, _____ [written amount or percentage of the estate or description of property]. This gift should be used for [state purpose] if and so long as the Iowa CareGivers determines that the need exists. If the Iowa CareGivers shall determine at the outset or at a later time that the need does not exist, or no longer exists or for some reason it is not possible (or prudent) to administer my gift as originally intended, then the Iowa CareGivers may, in its sole and uncontrolled discretion, direct the use of my bequest for a purpose related as closely as possible to that stated above."

If you have named the Iowa CareGivers in your will or trust, please let us know so we can ensure that your gift is used according to your wishes. Notifying us of your plans will enable us to plan for the use of your future gift. However, if you prefer to remain anonymous, we will keep your name and gift in strict confidence. For further information, please call us at (515)223-2805.

The Iowa CareGivers can help you make a philanthropic impact and determine ways in which you and your family may potentially benefit, but we do not give legal, accounting or tax advice. We urge you to consult with your independent advisor (attorney, financial planner, or accountant).

Document Your Charitable Wishes

ONCE YOU DECIDE THE PLANNED GIFTING ARRANGEMENT THAT IS BEST FOR YOU, DOCUMENTING YOUR CHARITABLE WISHES USING THE STATEMENT OF INTENT IS SIMPLE AND EASY:

- Describe your future gift to the Iowa CareGivers.
- Provide a "best guess" estimate of the gift's value in today's dollars.
- Designate how you would like your gift used.
- Send completed copies to the Iowa CareGivers.
- Keep copies for yourself, your family members, and your advisor.



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