

## DonorConnect:

*A Community Conversation Series*

# GIFTS OF A LIFETIME: LEAVING A LASTING LEGACY



**Jann E. Freed, PhD**





# Our Mission

To improve the quality of life for all by promoting charitable giving, connecting donors with causes they care about and providing leadership on important community issues...*we're simply better together.*

# By the Numbers

**2,600+**

Charitable  
Funds

**\$1.0B**

Assets Under  
Administration

**\$62M**

In Grants  
(2023)

**\$79M**

In Gifts  
(2023)

**46**

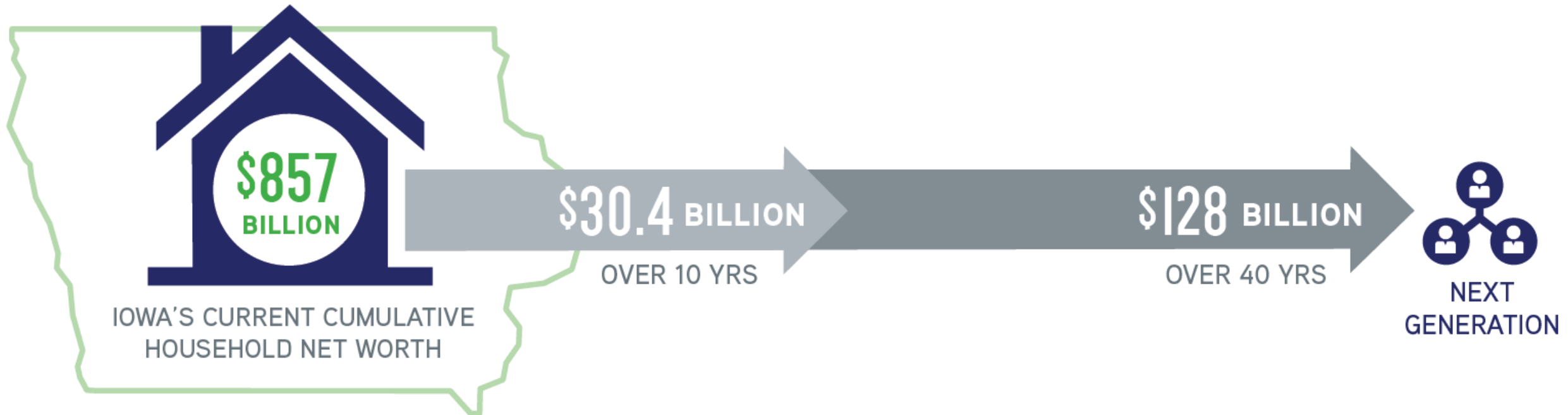
Statewide  
Affiliates

**88**

Charitable  
Investment  
Partners

As of Sep. '24

# "Great Wealth Transfer"



# Giving Tools & Strategies



“It’s amazing how some may not think of themselves as able to give significantly during or after their lifetimes,” shared Lance. “But once you have the conversation and they learn about the giving tools available through the Community Foundation, they understand that giving can be a simple and joyful experience, whether done alone or alongside loved ones.”



**Carolyn and Lance Gunkel involve their whole family when utilizing their DAF.**



# Donor Advised Funds



## DAF's

- “Charitable Checking Account”
- Immediate tax deduction
- Tax-free growth
- Anonymity options
- Succession planning / Next-generation engagement

# Planning Opportunity



## Bunching

- Break through standard deduction
- Multiple years of annual donations in single tax year
- May have high-income year
- Example: Client gives \$10,000 annually to charity

“We like the Community Foundation model of giving. Giving directly from our IRA makes it easy to support causes we are passionate about.”

Lois Fingerman



# IRA Charitable Rollover

# Designated Funds



- Direct support to your favorite charity
- Endowment
- Specific programs or purposes

# Planning Opportunity



## QCD – IRA Rollover

- Qualified Charitable Distribution (QCD)
  - AKA “IRA Charitable Rollover”
- \$105,000 / year, per individual, age 70.5 and older
- Example: Endowing annual gift to church or favorite charity
  - \$20,000 gift = \$1,000 / year **forever**

# Legacy Funds

“Margaret spent most of her life in Des Moines and her entire career as a waitress at Noah’s Ark. When we talked about how to leave a legacy; I told her there was no one better than the Community Foundation. Margaret could use a local partner to make a local impact.”

Mike Tracy



Margaret Kitzrow and Mike Tracy

# Legacy Funds

- Set of charitable instructions
- No cost to establish or amend



**For Rachel Stauffer and Jim Lawson, Des Moines is the place they've made their home and decided to stay, even when they had opportunities to move elsewhere. They've created a charitable estate plan to ensure their love of Des Moines carries on even after they're gone.**

# Planning Opportunity



## Various

- Ability to change your mind on charitable beneficiaries and/or percentage allocation
- Example: Complex estate plan instructions
- Example: IRA Beneficiary

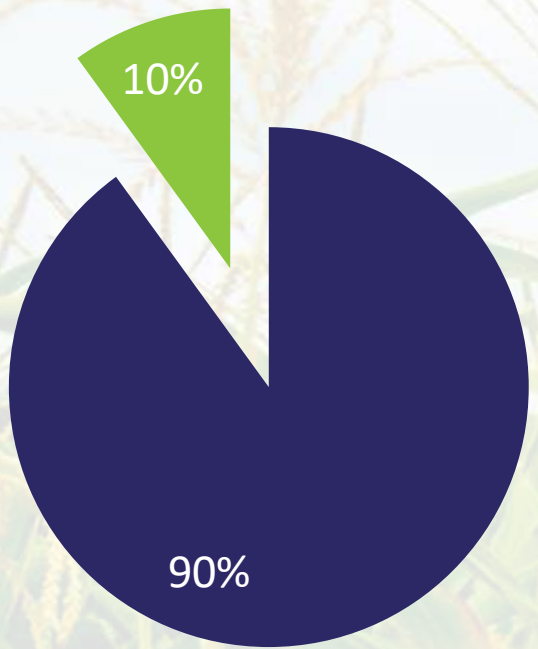


# Non-Cash & Complex Gifts



# Non-Cash Gift Types

## Assets Owned



- Cash
- Non-Cash Assets

## Assets Given



# Non-Cash Gift Types



- Appreciated Securities
- Real Estate
- Business Interests
- Personal Tangible Property
- Retirement Plans
- Life Insurance
- Farmland
- Grain/Livestock
- Machinery
- **Many more!**

# Questions?



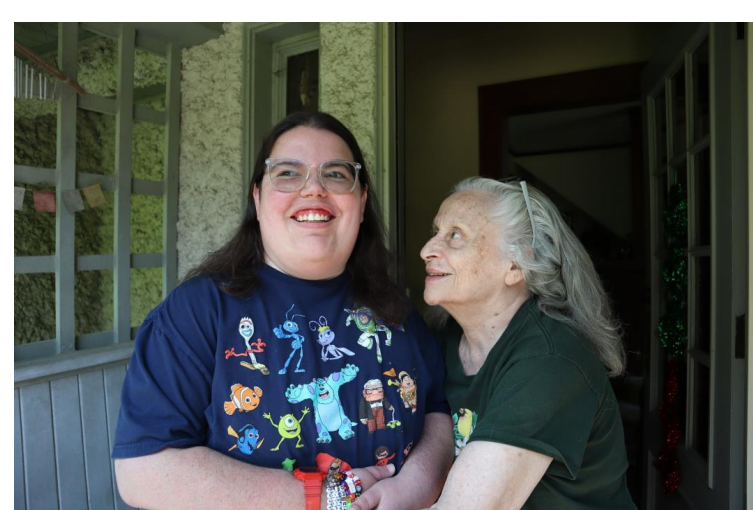
The Meals on Wheels  
Difference. A meal,  
a friend, a lifeline.



Food Insecurity, Nutrition

Well-Being,  
Safety

Social Isolation



**"The food is so good, but ...it's about the people, and it's about feeling safe and feeling like there is someone to talk to." – Client Paul**

# Your Gift of Time, Talent ...

Volunteer

## Opportunities



**Meal Delivery:** Delivering WesleyLife Meals on Wheels to those in the community is the heart of our volunteer program. Here's what you need to know!

-  Delivery of meals takes place Monday through Friday between 10:30 a.m. and 1 p.m. Volunteers serve a total of 18 volunteer routes daily, and each volunteer route includes 10-15 clients.
-  Some routes will require you to stop at our Meals on Wheels headquarters, 3206 University Ave. in Des Moines, to load meals into your car. Other routes involve apartment complexes, and a Meals on Wheels driver already will have dropped off the meals you'll deliver to individual apartments.
-  Delivering a route will take you about 60 to 90 minutes.



**Hydroponic Farm:** Located on the lower level of our campus, the Prairie Meadows Hydroponic Farm – the nation's only hydroponic farm associated with a Meals on Wheels program – grows leafy greens without soil to healthily augment the meals we serve our clients and help combat food insecurity in the greater community. Volunteer opportunities are available within this non-profit operation.

-  Take part in planting, harvesting, and preparing/packaging! Shifts are available Monday through Friday: 10 a.m. -12 p.m., 12 p.m. – 2 p.m., and 2 p.m. –4 p.m.
-  No experience is necessary, and training is provided.
-  Bring a friend! Experiences are available for individuals or for small or large groups.



**Friendly Caller Program:** Volunteers can bring joy and connection to our most socially isolated clients with a friendly virtual visit. Anyone can take part!

- Phone a client once a week or once a month. Calls can be made between 10 a.m. and 5 p.m. from any setting. Chat about anything you choose, and/or help our clients select their meals for the month!
- A quick set-up through Call Hub masks your telephone number to our clients to protect your privacy.
- Training is provided.



Learn More and Get Started Today: [WesleyLife.org/meals-on-wheels](https://WesleyLife.org/meals-on-wheels)  
Or email [MOWVolunteer@WesleyLife.org](mailto:MOWVolunteer@WesleyLife.org)

# ... And Treasure ... is a lifeline!

# 359,339

*Meals Served So Far in 2024*

*Support* a food insecure veteran or older adult today!

Scan this code to donate quickly, securely, and easily.



- \$9.15** One meal
- \$64** A week's worth of meals for one person
- \$128** Two week's worth of meals for one person
- \$275** A month's worth of meals for one person

*Thank you!*





# Stay Connected



## GIVEdsm

From capital campaigns to timely needs, GIVEdsm makes it easy to support the causes you care about most. Get started today at [GIVEdsm.org](https://GIVEdsm.org).

## Upcoming Opportunities

We host regular professional development and training opportunities on a wide variety of relevant topics. Keep an eye on our events page throughout the year for opportunities to join.





[www.desmoinesfoundation.org](http://www.desmoinesfoundation.org)