



The Community Foundation of Greater Des Moines makes it easy for investment professionals to help clients meet their financial and giving goals. Through the Community Foundation's Charitable Investment Partners program, your clients can establish charitable funds at the Community Foundation while you manage their charitable assets.

The Community Foundation works with professional advisors to strategically structure charitable gifts that not only benefit the community, but are financially savvy as well. Our dedicated team can help you find and structure the best solutions for your clients through a variety of available giving options.

## Tax Benefits:



- The Community Foundation provides access to the Endow Iowa Tax Credit program, a 25% state tax credit.
- Our team of giving experts can assist in facilitating gifts of appreciated property, such as real estate or stock, and allow the donor to avoid capital gains taxes.
- The Community Foundation's giving experts can help you and your clients explore opportunities to meet charitable goals in the most tax-wise ways available.

## Local Giving Experts:



- Through our Strategic Giving Services we can help your clients develop giving plans, engage younger generations in charitable conversations or guide businesses as they seek to maximize community impact.
- We can match your clients with community causes they care deeply about and offer extensive knowledge about local charitable organizations and emerging community needs.
- The Community Foundation has the ability to facilitate gifts of all kinds including complex gifts such as real estate, privately held stocks, closely held business interests, charitable gift annuities, farmland and much more.
- A variety of fund types are available to fit the charitable goals of your clients such as donor advised funds, designated funds or legacy funds.

## Assist



You assist clients in meeting their giving goals by establishing a charitable fund at the Community Foundation. We establish an investment account with you so the fund's assets can continue to be managed through your investment services.



## Grow



Your clients grow charitable assets thanks to your investment of the fund's assets and maximum tax savings available through the Community Foundation. This includes the potential for Endow Iowa Tax Credits, a 25% state tax credit.



## Grant



Your clients recommend charitable grants from the fund to the causes they care about.



LOUISA & JIM SANDAGER

“As we were considering ways to give now and in our future retirement years, working with the Community Foundation made sense. If you are interested in supporting charities now and in the future, it is a no-brainer.”

— JIM SANDAGER

Mentorship has played an important role throughout Louisa and Jim Sandager’s lives. Mentors have shaped their careers, the couple’s commitment to community service and their shared desire to give not only their time and talents but their treasure as well. “I watched my parents give their time and resources, and I learned from Louisa’s father the positive effects getting involved has in a community,” shares Jim. “As we were considering ways to honor our parents and their legacy of giving, working with the Community Foundation was a great fit.”

Adds Louisa, “We want to pass the baton as it was passed to us. With two grown children, we want to share the values that were shared with us and help teach them what we have learned; impact is created by looking outside yourself.”

As the couple considered charitable giving strategies with their accountant, using land they owned at a low-cost basis provided an excellent way to fund a charitable giving fund at the Community Foundation. “As a financial advisor, I was familiar with the Community Foundation team and its excellent reputation. Personally, I was pleased with the way the team stepped up when time was of the essence to facilitate our gift by year-end. The team made it easy, and we had every confidence it would be accomplished at the highest level. Working with the Community Foundation has gone from being a great tax strategy to being a personally impactful strategy that helps others.”

For more information about establishing a fund at the Community Foundation of Greater Des Moines, contact us at (515) 883-2626 or [info@desmoinesfoundation.org](mailto:info@desmoinesfoundation.org).



1915 Grand Avenue | Des Moines, IA 50309 | (515) 883-2626

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