



The
Legacy
Society

LEAVE A LEGACY


COMMUNITY FOUNDATION
of Greater Dubuque

“To know even one other life has
breathed easier because you lived:
This is to have succeeded.”

– *Ralph Waldo Emerson*



Our community is lucky to have
PEOPLE LIKE YOU.

With generous gifts of time, energy, talent and treasure, you nurture the people and places you care about. You delight in the joy of giving.

We invite you to join our **Legacy Society.**

By leaving a legacy gift to your community, you can make a difference for future generations and share the power and joy of living generously.



Although established today, many planned gifts take effect after the donor's lifetime. You do not need tremendous wealth to consider a legacy gift; whatever your financial situation, there are gift plans to fit your needs.

From very simple arrangements to more complex strategies, planned gifts can offer important estate, financial and personal advantages—allowing you to give in the most effective and beneficial manner.



The Legacy Society of the Community Foundation of Greater Dubuque honors individuals who have committed to supporting our community forever through a gift from their estate.

Often, these meaningful gifts go unrecognized because they come at the end of a donor's life. The Legacy Society is our way of acknowledging your commitment to the future—today.

Becoming a member is simple. Include the Community Foundation of Greater Dubuque as a beneficiary of a gift from your estate and notify us of your plan. We'll add your name to a leaf on our legacy tree in honor of your dedication to our community's growth.

Your philanthropic advisors

The Community Foundation of Greater Dubuque can help you:

- Determine the type of gift to leave.
- Show you the impact your gift will have.
- Share information about tax benefits.

We can also work with you and your professional advisors, including CPAs, attorneys, bankers and life insurance representatives.

The Community Foundation of Greater Dubuque

Like Dubuque itself, the Community Foundation was built to last. Since our establishment in 2003, we have partnered with hundreds of local individuals, families and organizations to help fulfill philanthropic goals. We steward their charitable gifts and make grants from their funds to fulfill their unique, personal wishes. We adhere to the highest national standards to honor donor legacies and to keep our promise to you and our community today, tomorrow and for generations to come.

The mission of the Community Foundation of Greater Dubuque is to grow philanthropy to improve life in Northeast Iowa by serving donors, strengthening nonprofits and leading collaborative initiatives to address community needs.

There's no place like home.

When you give through the Community Foundation, you ensure that your gift stays in your community. Unlike private foundations, the Community Foundation aggregates many funds, maximizing their impact while providing the maximum tax advantages for income, gift and estate tax purposes





Thelma Schlueter remembers her husband Philip as a very giving man. When he passed away, Thelma decided to honor the memory of her husband, daughter, and son by giving back to the community. “Rather than put everything in my will, I decided to give back while I’m still alive to enjoy it,” says Thelma. “There are so many needs in our community.”

Thelma established the Philip and Thelma Schlueter Family Endowment Fund at the Community Foundation to benefit causes close to her heart. She also included a legacy gift to the endowment in her will.



“This endowment will continue to help our community and honor the memory of my family **20, even 50 years from now.** I know my husband would be pleased and proud of what I have done.”

-Thelma Schlueter



What's your passion?

From churches, neighborhood and educational organizations to children's health, animal welfare, fine arts, and the environment, there is no shortage of causes to support in our community.

Making a legacy gift is an opportunity to reflect on your values and passions. Perhaps there is a cause you have felt strongly about through the years, or a local organization that has helped you or a loved one in a time of need. Whatever your inspiration for giving, your legacy gift is an enduring testament to the causes you hold dear.

Originally from Nebraska, Ed Babka's engineering career led him everywhere from Pennsylvania to Massachusetts and then to Decatur, Illinois, where he created *The Antique Trader* in 1955 from his basement. The niche publication eventually grew into the Dubuque-based Babka Publishing Co. with a circulation of 86,000 copies per week.



After selling his business in 1992, Ed and his wife Shirley continued to grow as philanthropists in their adopted hometown, supporting many local nonprofits with generous annual gifts. In 2008, they simplified their giving by creating a single endowment fund at the Community Foundation. "I decided to create a family fund that would pay out the same amount I had been giving annually," says Ed. "This way, my gift will support the charities for a long, long time."

Ed plans to continue this tradition of giving by leaving a legacy gift benefiting the many nonprofits he holds dear. "It's permanent—that's what I like about it. Long after you're gone, it will still be doing something good."



WHAT IS A FUND?

Think of it as your private foundation. When you give through the Community Foundation, we establish a separate and distinct fund—the vehicle that preserves your philanthropy and family name—to fulfill your stated charitable purpose. The assets are invested and grants are made from the fund. Grants carry the name given to the fund, and your philanthropy endures.

There are many different kinds of funds you can create.

Based on your wishes, we can create a unique plan that meets your charitable objectives while personalizing the financial and tax benefits to your needs.

The most common type of planned gift is made through your will and is called a bequest. This gift can be cash, securities, assets, a trust, retirement plan, insurance policy or part or all of your estate.

You can also choose whether you'd like your gift to be designated to a specific nonprofit, such as a church, school or museum, or to a community cause, such as youth, the environment or the arts. The Community Foundation also welcomes bequests to support its grantmaking programs to build a strong and prosperous region.



Norris Kuenzel

grew up in a two-story house on Main Street in Garnavillo across the street from City Park. Today, in this same City Park, children can explore a restored log cabin, courtesy of the Garnavillo Historical Society.

On summer weekends, volunteers staff the cabin and challenge young minds to imagine what it was like to split firewood just to heat water for a bath. The cabin is one of several facilities owned by the society including a restored Masonic Lodge and the Prairie Wind Garden. At the Garnavillo Historical Society Museum, men often study the collection of arrowheads while little girls race to try on fashion accessories in the hat room.

Norris, who died in 2013, had always loved history. His legacy gift created the Garnavillo Historical Society fund at the Community Foundation to ensure that the history of his hometown will be preserved forever. The endowment will support annual operations, special events and any future acquisitions.



Thank you for being a **philanthropist.**

A lot of people think you have to be rich to be a philanthropist but this isn't so. Your gift may be modest. Only your intentions need to be rich. If you've realized you have the power to change people's lives through your charitable giving, you're a philanthropist.

Making a legacy gift reflects your ongoing commitment to your community and the causes you value most. It enables you to act on your convictions and make a difference for others many years from now.

The Community Foundation of Greater Dubuque is here to help philanthropists like you give back to our community—now and forever. We invite you to call or visit us anytime to discuss your charitable giving goals.



COMMUNITY FOUNDATION

of Greater Dubuque

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