

PLANNED GIFTS

Bequest - through your will, helps David Hartmann Foundation continue the work important to you during your lifetime. Bequest language is simple: "I give to David Hartmann Foundation, an Iowa nonprofit corporation, at 108 E. Industrial St, DeWitt Iowa, 52742, the sum of _____ dollars (\$____), or _____ % of my residuary estate, or _____ property (describe same), for its general use and purpose."

Charitable Gift Annuity - a legal contract between the donor and David Hartmann Foundation through which the donor exchanges cash stocks, or other assets for an agreed-upon income for life.

Charitable remainder trust-used by donors to transfer assets to a trust, which then goes to David Hartmann Foundation after the death of the last beneficiary. You retain a fixed or variable income for life.

Unitrust - pays a variable rate of return

Annuity trust - pays a fixed rate of return.

Life Insurance - two types of life insurance policy gifts are possible:

Existing policy-You can name David Hartmann Foundation as the beneficiary. The estate would receive a deduction for the face value of the policy; there is no lifetime deduction to the donor. If you transfer ownership of the policy to David Hartmann Foundation, you receive a tax deduction approximately equal to the policy's cash surrender value.

New policy-You take out on a policy on your life and transfer ownership to David Hartmann Foundation You pay the premium amount annually to David Hartmann Foundation You receive a tax deduction for the annual premium payments. David Hartmann Foundation is the owner and beneficiary of the policy.

CURRENT ASSETS

Gifts of Cash

You can deduct a cash gift for income tax purposes in the year of the donation.

Gifts of Life Insurance

You can donate a life insurance policy naming David Hartmann Foundation as the beneficiary.

Gifts of Real Estate

If you own property that is fully paid off and has appreciated in value, an outright gift to David Hartmann Foundation may be the solution.

Gifts of Securities

Donate stocks that have increased greatly in value, with low yield.

IN KIND GIFTS

David Hartmann Foundation appreciates all individuals and organizations that make donations to us each year. Due to space limitations, we have developed guidelines for what we will or will not accept for our adults:

Slightly used clothing and sporting equipment

Unused toiletries

Slightly used shoes and boots

Restaurant, grocery and movie gift certificates

Call David Hartmann Foundation to discuss how such a gift might work for you, (563-659-4100) or e-mail David Hartmann Foundation at d.mullin@communitycareinc.net for further information.