

## Sample Editorial for Affiliated Funds -- 2011 Transfer of Wealth Study

( *AS MANY OF US ARE BENEFITING FROM A STRONG AG ECONOMY AND A POSITIVE OUTLOOK IN THE NEAR TERM*), it's important to remember that much of what we all enjoy today is the result of those who came before us. Goodness knows, we have much to be thankful for, and a lot of those benefits came from the vision and hard work of those who preceded us.

As supporters of charitable causes here in *HOMETOWN* and elsewhere, we've seen plenty of examples of people in our community planting seeds for those who will follow them. And what an extraordinary opportunity we all have to do just that!

In 2011, Nebraska Community Foundation completed an update of its 2011 Transfer of Wealth Study. The study provides stunning insights into the true abundance Nebraska enjoys and the critical need to act now.

Over the next 50 years, \$603 billion will transfer from one generation to the next in Nebraska. This wealth may be held in residential and agricultural real estate, securities, retirement accounts, business ownership and other assets.

In *LOCAL* County, the estimated 50-year intergenerational transfer of wealth is *\$LOCAL 50-YEAR AMOUNT*. Within just the next 10 years, *\$LOCAL 10-YEAR AMOUNT* is expected to transfer. Those are mind-boggling numbers!

Some of this wealth will go to taxes. Most will go to heirs, many of whom no longer live here in *LOCAL* County where the wealth was built over generations. If only a small portion of this wealth – just 5 percent – were given back through charitable gifts and endowed in community funds over the next decade, our county would have *\$AMOUNT OF 5% 10-YEAR TRANSFER* in permanent “savings accounts” within just 10 years.

The transfer of wealth study gives us an opportunity to dream and the motivation to act. Imagine what the earnings on *\$AMOUNT OF 5% 10-YEAR TRANSFER* of endowed funds could do for our hometown!

As volunteer Fund Advisory Committee members of the *HOMETOWN COMMUNITY FUND*, we are encouraging everyone to think about the future. First, if you do not have an estate plan in place, talk to a trusted advisor so that your wishes can be known and carried out. Second, remember your community. As an affiliated fund of the Nebraska Community Foundation, *HOMETOWN COMMUNITY FUND* can provide many easy, tax-wise ways of giving that will benefit your community and make you feel proud.

Nebraskans are among the most generous people in the nation. We give generously to our churches and charities all through our lives. However, far too few of us have made a plan to continue our charitable giving beyond our lifetime. If each of us included our community in just a small way within our estate plan, our children and generations to follow would have the financial resources to build the community of our dreams. Yours will be a gift that goes on giving forever.

Please let us know if you would like more information about planning a gift to your community!

*NAME, CHAIR*  
*HOMETOWN COMMUNITY FUND*

*NAME, VICE CHAIR*  
*HOMETOWN COMMUNITY FUND*