



“Thank you, Kelly and Virginia, for challenging the community. This increase in our endowment will undoubtedly prove positive for a great and everlasting future for this wonderful town.”

– JOEL HIGH



## Help us rise to the challenge!

Your generous gift will not only help build the unrestricted endowment today, it will continue to grow and keep giving tomorrow.

**Cash** – A gift of cash may be eligible for income tax deductions as prescribed by current law. Your cash gift may be by check, credit card or electronic funds transfer, which authorizes the automatic transfer of funds each month from your checking or savings account.

**Agricultural commodities** – Gifts of grain or livestock may provide significant income tax savings to a producer. Because the property is gifted, no revenue is recognized, and the cost of production may still be deducted as a business expense.

**Marketable securities** – A gift of publicly-traded stock, bonds or mutual fund shares is eligible to be matched at the full fair market value. Such a gift may provide you with additional tax benefits, as you will not pay capital gains tax on the appreciation in the value of the securities.

**Gifts of IRA** – Individuals who have reached age 70½ may contribute up to \$100,000 directly from their Individual Retirement Account (IRA), without having to recognize the IRA distribution in taxable income. If married, each spouse can transfer up to \$100,000 from his or her IRA.

**Checks may be made payable to “Bertrand Area Community Fund” and mailed to:**

Bertrand Area Community Fund  
P.O. Box 153  
Bertrand, NE 68927

As with all financial considerations, we encourage you to discuss potential tax advantages and other aspects of charitable giving with your attorney, tax adviser or financial consultant.

You may also make a donation to the campaign online at [www.nebcommfound.org/give/bertrand-area-community-fund](http://www.nebcommfound.org/give/bertrand-area-community-fund). Please select “Endowment Account” when you make your contribution to ensure your donation is matched.

**Contact Us:**  
bertrandfoundation@gmail.com



*Bertrand Area Community Fund is an affiliated fund of Nebraska Community Foundation.*

# Holthus Challenge



**Inspiring the community to invest their time, talent and resources to endow the dreams of all generations now and in the future.**



## INVESTING IN OUR FUTURE

A group of thoughtful community leaders launched the Bertrand Area Community Fund in 2011 as an affiliated fund of Nebraska Community Foundation. Now part of a statewide movement to spearhead community development and create future prosperity, the Fund is working to build a robust endowment to benefit our community long into the future.

Bertrand Area Community Fund is focused on building a permanent unrestricted endowment to award meaningful grants to local projects today and create a steady stream of revenue for community needs in the years to come. The endowment is an important tool to keep our hometown growing, thriving and improving for future generations. While Bertrand Area Community Fund grants out a portion of the income earned by the unrestricted endowment each year, the principal—and your gift—remains intact and grows forever.

Thanks to the generosity of community members like you, the Fund has already supported a number of projects to improve the quality of life in the Bertrand area. Some of those projects include:

- A new ambulance to provide lifesaving services to our neighbors
- Necessary renovations and upgrades to the Community Building
- Specialized playground equipment that allows children of all abilities to play together in the Village park
- Significant support for the Veterans Park Project, Young at Heart Senior Center and Bertrand Community School's Media Center and Community Weight and Fitness Project
- State-of-the-art HoloLens virtual and artificial reality technology that empowers students to take interactive learning to a new level



## OUR VALUES:

**Strategic** – We are intentional and purposeful.

**Inclusive** – We welcome people and ideas that work within our mission to strengthen the entire community. We value teamwork.

**Innovative** – We are forward thinking while still respecting the past and being receptive to the current needs and opportunities of the Bertrand area.

**Hard Working** – We seek to make a difference by empowering others and building ownership.

## NEBRASKA COMMUNITY FOUNDATION

Bertrand Area Community Fund is an affiliated fund of Nebraska Community Foundation (NCF), a 501(c)(3) corporation which provides financial management, strategic development and education/training services to communities, organizations and donor-advised funds across the state. NCF is confirmed in compliance with the highest National Standards for U.S. community foundations.

Working with NCF enables Bertrand Area Community Fund to receive tax deductible contributions and reduces administrative costs. This means every dollar received in donations benefits the Bertrand area.



“The willingness of the Bertrand community to intentionally plan for its perpetual vitality and growth is absolutely phenomenal! We are so excited to be a part of this community!”

– TRISTA NEWCOMB

## WE HAVE BEEN CHALLENGED!



Kelly and Virginia Holthus grew up and started their family in Bertrand. Though the Holthuses no longer live in the area, they have maintained their love for our community and care deeply about the future of the Bertrand area. This love of Bertrand has inspired the Holthuses to issue an incredible challenge to our community.

If we raise \$300,000 before December 31, 2021, the Holthuses will match the funds 2:1 resulting in as much as a \$450,000 increase to Bertrand's community unrestricted endowment.

### Think of the possibilities!

This significant increase in our community unrestricted endowment will create unimaginable opportunities for our hometown and future generations who call the Bertrand area home. A \$450,000 increase to Bertrand's unrestricted endowment will result in over \$20,000 of additional annual

endowment payout in the first year alone. Within 20 years, that's over \$544,000 in cumulative grantmaking potential! We cannot pass up this opportunity to create a legacy!

“Thank you, Kelly and Virginia Holthus, for your gift to the community of Bertrand. You have forever changed the lives of many with your generosity.”

– CHRISTOPHER DAVISON

## THE POWER OF ENDOWMENT

What are your hopes and dreams for the future of the Bertrand area? This opportunity has put those dreams within our reach.

Building our community endowment will put philanthropy to work in our hometown, providing a steady stream of resources for community improvements today and investments for tomorrow. Together, we can build a brighter future for the Bertrand area and create a community that our children and our children's children are proud to call home.

## \$450,000 BEGINNING BALANCE



This is an example using the following assumptions: 7.5% return (net of fees), 4.5% annual endowment payout, asset allocation: 75% equities, 25% fixed income.