THE TRANSFER OF WEALTH IN POLK COUNTY

2020 POPULATION
5,214

AFFILIATED FUND ENDOWED ASSETS
$4,748,653

CONFIRMED PLANNED GIFTS
2
Totaling $10,660,795
to be endowed

As of June 30, 2026

PEAK TRANSFER YEARS
2021–2046

10-YEAR TOW
$528 million

5% OF 10-YEAR TOW
$26 million

As of November 2021

Over the next 10 years in Nebraska, more than **$100 billion** will transfer from one generation to the next. In 50 years, that number exceeds **$950 billion.** This phenomenon has come to be known as the intergenerational transfer of wealth. There is always a transfer from generation to generation, as parents pass away and leave their estate to their children. But if the heirs no longer live where they grew up, that wealth may leave as well.

WHAT WE KNOW

1. Nebraska has incredible wealth and ALL Nebraska communities have wealth to give.
2. The wealth is transferring NOW and we must act with urgency.
3. Our communities need these assets and many are already successfully putting them to work.
4. When we leave some of our wealth to the places where it was made and accumulated, we can ensure a more prosperous future for our Nebraska hometowns.

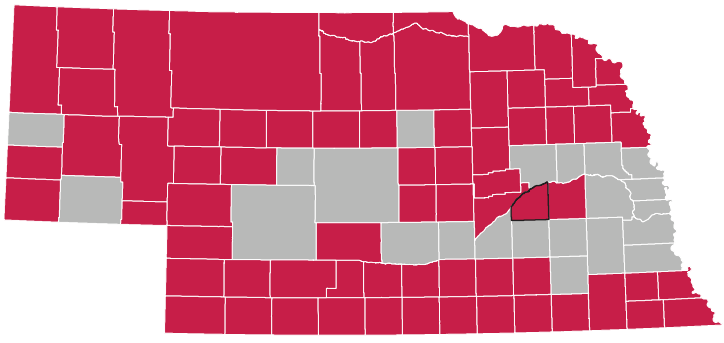
THE OPPORTUNITY IS MASSIVE

Over the next 10 years in Polk County, $528 million will transfer from one generation to the next. In 50 years, that number exceeds $4.9 billion. The wealth may be held in real estate, securities, retirement accounts, and other assets. Some will go to taxes. Most will go to heirs. Due to outmigration, many of those heirs no longer live where the wealth was built and may no longer feel connected to those places. Once wealth leaves our communities, the opportunity for give-back becomes more and more unlikely.

THE TIME IS NOW

Many Nebraska counties are approaching or are already in the midst of their peak transfer years. In other words, there is real urgency to act now. The opportunity will never be greater.

TIMING OF PEAK ESTATES



2021–2045 2046–after

THE SOLUTION IS SIMPLE

We must act now to encourage charitable investment in the future of our communities while the window of opportunity is open. We must teach, encourage, and inspire generous Nebraskans to give back today, and include their community in their estate plans for tomorrow. Imagine if just five percent of this abundance were given back to the places where it was made and accumulated.

This is your opportunity to enrich Polk County's future. We're asking you to consider leaving just five percent of your assets to your favorite Nebraska hometown or to Nebraska Community Foundation to benefit all of our communities. When you leave just five percent to a community's endowment, you can secure your family's legacy and help your hometown thrive.

Visit www.nebcommfound.org to learn more about NCF affiliated funds benefiting your county and stories of communities successfully putting the transfer of wealth to work in their places.

FIVE WAYS TO HELP YOUR HOMETOWN THRIVE

5 TO THRIVE

- Visit **www.fivetothrivene.org** and learn more about the transfer of wealth in your county.
- Explore NCF's planned giving resources at **nebcommfound.giftlegacy.com.**
- Talk to your professional advisor about including your community in your estate plans.
- Give to the endowment of your local community fund, Nebraska Community Foundation, or another favorite charity.
- Spread the word!
  When we all leave five, our hometowns thrive!

REMEMBER:

Once our wealth leaves the community, it is gone forever.

Once our wealth is endowed in our community, it is here forever.

The time to act is now—the opportunity will never be greater!

NEBRASKA COMMUNITY FOUNDATION

Nebraska Community Foundation | PO Box 83107 | Lincoln, NE 68501-3107
402.323.7330 | www.nebcommfound.org

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