

KEEP 5
IN KANSAS

A Plan for Kansas



Ensuring our cities, towns and counties remain **great places to live for future generations of Kansans.**

Transfer of wealth

Discover the potential



Transfer of wealth (TOW)

Estate wealth is handed down from one generation to the next

\$79 Billion by 2020
\$598 Billion by 2064

The image features two flags on poles against a dark blue background. The top flag is the United States flag, and the bottom flag is the state flag of Kansas, which includes the state seal and the word 'KANSAS'. A solid yellow horizontal bar is at the bottom of the image.

What is happening
to this transfer
of wealth?

The **transfer of wealth** has three possible destinations:

TOW { Heirs
Taxes
Charity

Inherited wealth

In years past

People typically stayed in the community where they were born and raised.

Estate wealth passed from one generation to the next, but remained in Kansas.

Inherited wealth

Today

Fewer people spend their lives in one community or state.

When estate wealth leaves our state, it will likely never return.

Providing for family is important, but what about Kansans who also want to **support the community where they raised their family, earned a living and enjoyed a good life?**

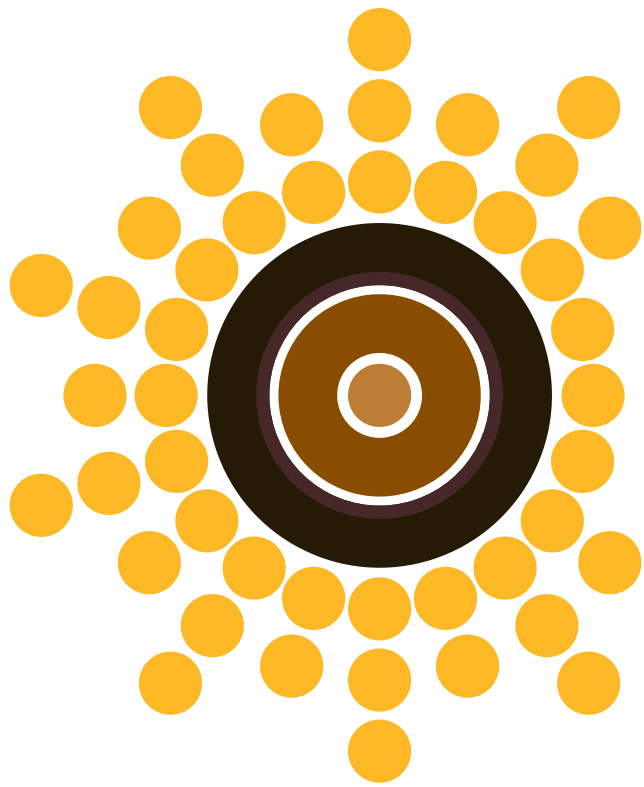




How can we keep
a portion of the
TOW in Kansas?

Community foundations can help Kansans who want to remember their hometowns as well as their families.





KEEP 5 IN KANSAS

A little planning. A big impact.

The **Keep 5 in Kansas** campaign asks every Kansan to consider designating **at least 5% of their estate wealth to their local community foundation.**

By designating as little as 5% of estate wealth to our communities, we can **create a permanent source of funding that will improve the quality of life for all Kansans.**

5% of the TOW

\$4 billion by 2020

\$30 billion by 2064

Keeping 5% in Kansas can make a significant difference in the future of our communities.



A photograph of the Newton Medical Center building, featuring a large glass facade and a sign that reads "Newton Medical Center". The image is overlaid with a semi-transparent blue filter. The text "How can I establish a legacy to benefit my community?" is written in white, bold, sans-serif font across the center of the image.

How can I establish
a legacy to benefit
my community?

Make a **big impact** on your community by **setting up a fund at your local community foundation!**



What are community foundations?

Community foundations are **tax-exempt, nonprofit, autonomous, nonsectarian, philanthropic institutions.**

The long-term goal of any community foundation is to build permanent funds supported by many donors to **benefit charitable causes within the local area.**

Community Foundations:

- Build permanent funds
- Pool and leverage resources
- Process complex financial vehicles
- Offer significant tax advantages
- Provide administrative support
- Protect your charitable dollars

Ways of Giving

- Stocks, bonds and mutual funds
- Real estate
- Personal Property
- Cash
- IRAs and other retirement funds
- Bequests
- Life Insurance
- Commodities

Types of Funds

- **Unrestricted:** address emerging and persistent needs in your community
- **Donor-Advised:** make recommendations on distributions to qualified charities (an alternative to a private foundation)
- **Designated:** establish funds for specific organizations of your choice

Types of Funds

- **Field of Interest:** specify an area of interest for your fund, such as education or the arts
- **Scholarship:** support individual students in their educational endeavors
- **Expendable – Special Projects:** short-term, non-endowed funds with a specific objective related to a project or result

Working with generous Kansans,
**community foundations direct funds to
the causes that matter to local citizens.**

- Schools
- Churches
- Parks
- Hospitals
- Nonprofits
- Community Arts

...And so much more!

Leaving a Legacy: Marga Ebel



- Left \$360,000 to the Hillsboro Community Foundation to establish the Marga Ebel Health Fund (a field of interest fund)
- Addresses the health needs of local children
- Using these funds, the Hillsboro school district now has a program that provides dental screenings to all students, and dental work to children needing urgent or significant care whose families qualify for assistance
- Endowment provided \$18,000 to the dental program in its first year alone



NEWTON STATION

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Pizza-Hut Area Office

Who will benefit from Keep 5 in Kansas?



Keeping a small portion —
even just 5% — of your estate in
your community through your
local foundation will...

Strengthen your community

**Create a permanent source of
funding to address local needs**

Provide resources for future generations

Funding for local causes =
**better communities that attract
and retain more people**

Create a lasting legacy

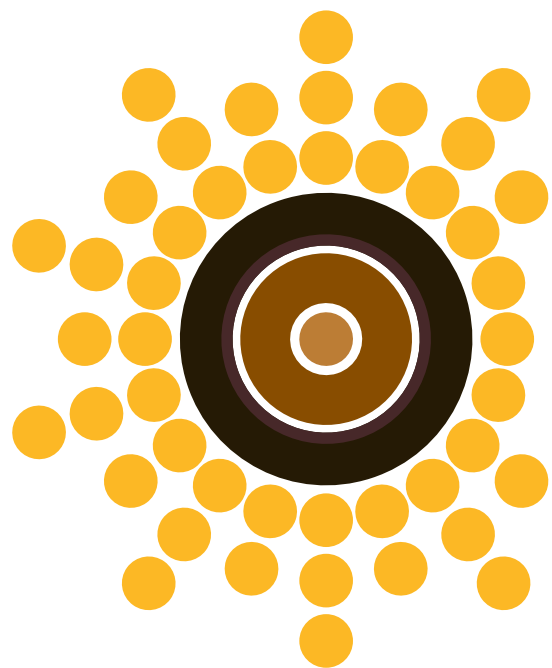
Establish a gift that will allow
your **charitable dreams to live
on forever**

**Together, we can make a bright future
for the people who call Kansas home.**





Visit [keepfiveinkansas.com](https://www.keepfiveinkansas.com)
to learn more!



KEEP 5
IN KANSAS

Thank you for your interest in the
Keep 5 in Kansas campaign!

The Keep 5 in Kansas campaign is sponsored by the Kansas Association of Community Foundations, with support from the Kansas Health Foundation.