

## PUTNAM COUNTY TRANSFER OF WEALTH

*\$800,000 POSSIBLE*



A recent study concludes that if just 5 percent of the projected wealth transfer in Putnam County were donated to endowments at the Community Foundation, there would be an additional \$800,000 for community improvements every year by 2017. Commissioned by the Indiana Grantmakers Alliance, the Transfer of Wealth Study follows the work of Boston College researchers who reported that the United States was beginning a \$41 trillion transfer of wealth from one generation to the next (Havens & Schervish; Boston College, 1999). The Center for Rural Entrepreneurship in Lincoln, Nebraska, conducted the Indiana study and has conducted similar research in Nebraska, South Dakota and Wisconsin.

*Four ways to help yourself, help your family, leave a legacy, and transform our community*

1. **Bequest.** Name a fund at the Community Foundation as a partial beneficiary of your estate in your will.
2. **Life Insurance.** Name the Community Foundation as a partial beneficiary of your life insurance policy.
3. **Retirement Assets.** Name the Community Foundation as a partial beneficiary of your retirement assets
4. **Let us know.** Be sure to let us know your plans so we can be sure to fulfill your wishes exactly as you intend.