

## Developing a Legacy of Service & Care

*The Isabella County  
Commission on Aging  
Endowed Fund*



*Giving to the Isabella County Commission on Aging Endowed Fund is giving to the care of the Elders in our community. It allows you to give a generous gift that will have a lasting effect on the services received by the Elders in our county.*

### **How it works**

- You can make a bequest to the Isabella County Commission on Aging ( I C C O A ) Endowed Fund through your will and estate. You can decide to do it at any age by adding to an existing will or drafting a new one. In doing so you leave a legacy to the ICCOA and your community, while enjoying the assets you need to maintain your current lifestyle. Plus, you are able to distribute some or all of your assets, tax free.
- You can give a gift of cash, appreciated stocks, real estate or other assets. Some of the most tax-efficient asset types to give through your will come from retirement plan accounts, since heirs would be taxed on the income in respect of the decedent (IRD). You can choose to give a stated dollar amount, a specific property, a percentage of your estate, the remainder after distributions to other beneficiaries, or you can make your gift contingent on certain events.
- Your gift will be placed into the ICCOA Endowment and will be invested over time. Earnings from the endowment are used to address the needs of Older Adults throughout Isabella County. Your gift is a permanent source of community capital, helping to do good work forever at the Commission on Aging.
- The Mt. Pleasant Area Community Foundation handles all the administrative details. They can work with you, your family and even your financial advisor to find the right answers.

**Mt. Pleasant Area**  
**community foundation<sup>SM</sup>**

113 W. Broadway P.O. Box 1283 Mt. Pleasant, MI 48804-1283  
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**For good. For ever.<sup>SM</sup>**

### A Legacy of Service and Care

The Isabella County Commission on Aging has been a part of our community since 1973. Our mission is to promote the health, independence and fulfillment of Older Adults through the coordination and provision of diverse services and opportunities. We serve the needs of our Elders and their families by providing a variety of In-Home programs such as, Home Delivered Meals, Homemaking, Personal Care, Respite Care, Caregiver Training, and Case Management. We work in nearly every school system and day care center in the county with our Foster Grandparent Program. Plus we provide support to many isolated and special needs Elders with our Senior Companion Program. For those Older Adults who are able to be active in the community we have our Congregate Meals sites and our Senior Center which provides many activities and a Travel Program. With all of these services we still have the heart of our programs, which is represented by hundreds of volunteers through our Gold Key Volunteer Program. Our volunteers enable us to expand our services and care, which helps us to better answer the needs of Older Adults in a dignified manner.

The Isabella County Commission on Aging has developed into a leading multi-service agency that provides a community focal point for the needs of our Older Adult population and their families.

## Bequest by Will

### Ten reasons people choose to give through community foundations

one

We are a **local organization** with deep roots in the community.

two

Our volunteers and professional staff have **broad expertise** regarding community issues and needs.

three

We provide highly **personalized service** tailored to each individual's charitable and financial needs.

four

Our funds help people **invest in the causes** they care about most.

five

We accept a wide **variety of assets**, and can facilitate even the most complex forms of giving.

six

We partner with **professional advisors** to create highly effective approaches to charitable giving.

seven

We offer maximum **tax advantage** for most gifts under federal and state law.

eight

We **multiply the impact** of the gift dollars by pooling them with other gifts and grants.

nine

We build **endowment funds** that benefit the community forever and help create personal legacies.

ten

We are a community leader, convening agencies and **coordinating resources to create positive change.**

The elder population is the fastest growing age segment of our society. The care of our Elders is becoming more and more expensive. It is the goal of the Isabella County Commission on Aging to maintain a level of quality care, and in order to this we need to provide a more stable long-term source of funds. The establishment of the ICCOA Endowed Fund is a step in that direction.

A bequest or memorial to the Isabella County Commission on Aging Endowed Fund is a tribute that will live on in the services and care the Commission on Aging provides to our community.

The Mt. Pleasant Area Community Foundation provides a simple, powerful and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals.

You can make a gift of cash, stocks, bonds, real estate, or other assets to your community foundation. Most charitable gifts qualify for maximum tax advantage under federal and state law. For more information and ideas on ways to integrate your financial planning with charitable giving, ask your financial planning with charitable giving, ask your financial advisor or contact the Mt. Pleasant Area Community Foundation.

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