



FOCUS ON PHILANTHROPY

October 2024

A publication of
UnityPoint Health -
Allen Foundation

New Member of Gerard Circle

**Northeast Iowa
Charitable Benefits,
Inc.**

To learn more about
Gerard Circle, call
(319) 235-3960.

Complimentary Estate Planning



Dr. Eddie Thompson
Thompson & Assoc.

Upcoming Dates:

— *Tuesdays* —
October 8
November 12

To learn more,
call (319) 235-3960.

**October 21–27 is
National Estate
Planning Awareness
Week!**

If you'd like to discuss
Charitable Estate
Planning, call
(319) 235-3960.

Tax-Smart Charitable Giving

Learn how you can maximize the benefits of a tax-deductible donation.

Donating to a charity can be a great way to show support for a cause you're passionate about—but did you know that some donations can also benefit your taxes?

- **Charitable IRA Rollover gifts.** If you are age 70½ or older, you can transfer up to \$105,000 from your IRA and avoid paying income taxes on this distribution.
- **Appreciated Stock.** Contact your broker to initiate the transfer. Many donors, instead of donating cash, will donate stock and then, in turn, purchase new stock with the cash they were going to donate.
- By establishing a **Charitable Gift Annuity**, you will not only receive a partial charitable deduction, you will also receive a fixed stream of income for life.
- **Donor-Advised Fund.** A tool that allows donors to contribute assets to an investment fund managed by a sponsoring organization, with the ability to claim an immediate tax deduction and spread giving over time.
- **Gifts of Grain.** For many cash-basis farmers, significant tax savings can be achieved by donating crops directly to a charity. By contributing crops, the cash-basis farmer avoids having to include the sale of the cash crop in their income. This results in savings of self-employment taxes, federal income taxes, and state income taxes.



Contact us to learn more about donations that can benefit your taxes!

**The tax information provided is general and educational in nature, and should not be construed as legal or tax advice. Allen Foundation does not provide legal or tax advice.*



**Join us on the
International Day of
Giving – Giving Tuesday!**

The Allen Foundation is raising funds to renovate a facility for the new Allen Child Protection Center. This expansion will allow us to better serve children and dependent adults with the care and protection they desperately need. Together, we can make a lasting impact in our community.



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Hops for Hospice

OCTOBER 17, 2024
5:30 - 7:30 P.M.
 Waterloo Center for the Arts

Join us for an evening of beer and wine sampling, live music, and light appetizers to support the patients and families of UnityPoint Hospice.

Live Music by **Brad & Kate**

Scan for ticket and sponsor information:

UnityPoint Hospice

Notes from the Executive Director: Mike Lind



Give to what you are passionate about. This is what we tell our team members each year during the annual Employee Giving Campaign.

Many thanks to our **Dignity Sponsors:**



And our **Compassion Sponsors:**

- Dr. and Mrs. Russell Adams
- Invision Architecture
- Dr. Eric M. Neverman and Alexa Hach
- Second State Brewing Company
- SingleSpeed Brewing Company
- Western Home Communities

Wish of the Month: Mental Health Walk-In Clinic

Just like any other patient with an illness, injury or additional health care need, patients seeking help with their mental health need an access point when they require urgent support, but the need does not constitute a visit to the emergency department.

The Mental Health Walk-In Clinic opened in the fall of 2021 and works much like an Urgent Care Clinic, allowing those who need help to get it when they want it, now.

The clinic is housed at Allen Hospital and is open Monday through Friday to serve those with urgent needs.

If you would like to learn more or to make a gift in support of the Mental Health Walk-In Clinic, please call the Foundation at (319) 235-3960 or email Michael.Lind@UnityPoint.org.

Check out the full Wish Book at unitypoint.org/giving/allen-foundation

Did you know that hundreds of Allen Hospital and UnityPoint Health employees in the Cedar Valley give back generously each year?

For the past several years of this annual campaign, we have used the theme, "Your Passion. Our Purpose," when employees are considering their gifts to the Allen Foundation and the Cedar Valley United Way.

We encourage our employees to consider what they are passionate about and we'll connect it to our purpose.

For example, an alum of Allen College may choose to support the college with a gift toward scholarships. A leader might choose to support the service line that they head-up. Or maybe a provider sees the need for a new service or program to best serve our patients.

No matter the passion, we are so grateful to work with many generous team members that see the importance of giving back.

Thank you!

Mike Lind, Executive Director