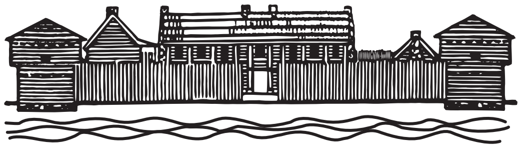

Ways to Give

Preserving our Past - Forging our Future

Old Fort Madison Capital Campaign 2025-2027

The campaign objectives of the Old Fort Madison Preservation, Inc. (OFMP), a 501 (c)3 non-profit corporation, are to raise funds to rebuild the Old Fort on higher ground, to add a dynamic Living History Center and to develop operational and legacy funding to sustain this important historical, educational community attraction. We encourage you to commit with a gift now or pledge a gift that is payable over five years. We are contacting individuals, corporations, foundations, service organizations, as well as local, state and federal entities. A Donation/Pledge Card is available. Please call 319-470-3642 to visit about any of the following ways to give:

OUTRIGHT GIFTS

▹ **Gifts of Securities**

Donors very often use appreciated securities – including publicly traded and privately held stock and mutual funds – to make capital campaign gifts. The attraction of this method of giving is that the donor is entitled to take a charitable deduction for the full current value of appreciated securities held longer than one year and is able to avoid paying the capital gains tax that would be due if the donor sold the securities. It is the policy of the OFMP to sell the securities immediately.

▹ **IRA Rollover and Required Minimum Distribution (RMD)**

A direct transfer of funds from your IRA custodian, payable to a qualified charity like the OFMP, as described in the IRS Code, can be given at any age and can be excluded from your taxable income. If, however, you are age 73 or above, it can also be counted toward satisfying your RMD for the year, up to $100,000.

▹ **Cash**

A gift of cash is available immediately to OFMP and inmost cases is 100% deductible for donors who itemize deductions. Your check should be made payable to OFMP.

▹ **Donor Advised Fund (DAF)**

You can establish a DAF with an irrevocable contribution of personal assets with a financial management entity, name your account, advisors, and any successors or charitable beneficiaries. You receive immediate tax benefits. You can contribute to the fund as often as you like. While your invested funds grow tax free, you can recommend grants to charities like OFMP over time.

▹ **Real Estate and Gifts of Property**

We welcome real estate and personal property gifts.

▹ **Gifts In-Kind**

To donate materials, equipment or time to be used in rebuilding, renovating and equipping the structures within the Old Fort complex, please call 319-470-3642 or send an email now to savethefort@gmail.com.

MATCHING GIFTS

If your employer, or your spouse's employer, has a program that matches all or a part of qualifying donations, you can double or event tripe the value of your gift to the Old Fort Madison Preservation, Inc. Check with your HR department to see your employer matches gifts to charities.

MEMORIAL AND HONOR GIFTS

To honor a loved one in a lasting way, memorial or honor contributions may be sent to OFMP in his/her/their name(s). We will assist you in tracking and acknowledging these remembrances.

PLANNED GIVING – a Bonus Way to Give

A charity's use and proceeds of a Planned Gift are deferred until a later date, but you may also receive some benefits in the meantime. Feel free to call OFMP at 319-470-3642 or visit with OFMP members to discuss any of the numerous options described below. You can make or increase an "Outright Gift" by also making use of a "Planned Gift" These options can be tailored to meet your financial capabilities and charitable intent. Options include, but are not limited to the following:

▹ **Bequest**

You can leave a specific dollar amount, a specific percentage of the full estate or the entire estate to the OFMP. A Residuary Bequest means that you give the residue or remainder of your estate after other specific bequests are made to the OFMP or other recipients. A Contingent Bequest means that you make the gift dependent on certain events.

▹ Live-at-Home Gift
You transfer the ownership of your personal residence, but retain the right to use the property for life.

▹ Gifts of Life Insurance
You may name OFMP as one of your beneficiaries of as the sole beneficiary of your life insurance policy. A donor may also transfer ownership of a policy to the OFMP. In the case of ownership transfer and/or sole beneficiary status, the policy's face value is removed from the donor's taxable estate. Also, future premiums paid on the policy by the donor can be treated as charitable gifts, and if the policy has a cash value, you can take an immediate tax deduction.

▹ Charitable Remainder Annuity Trust
You may give a specific amount that is placed in a trust managed by a financial institution. You do give up control of the funds, but retain a life income interest in the funds (i.e., a set amount to be received on a set schedule). When you and other beneficiaries die, the remainder of the funds is given to the OFMP. This trust may take effect while you are still living or may be included in your will, should you decide not to receive income while living.

▹ Charitable Remainder Uni-Trust
This instrument works nearly the same as the Charitable Remainder Annuity Trust, but in this case, you will receive a set percentage of the fund's earnings during your life.

▹ Charitable Lead Trust
You give the OFMPI a specified amount that is placed in a trust for a specified period. During that time, the OFMP receives the income and when the trust ends, the principal reverts back to you (or your beneficiaries, if you so stipulate). Usually, the donor is not taxed on the income that goes to the organization during the life of the trust.

QUESTIONS?

How do I make a Pledge?
When you make a multi-year pledge commitment to the OFMP, it helps sustain funding for the Old Fort's many programs and services. Pledges can be made up to five years. Invoices meet your timing.

Is there a minimum amount I can pledge?
No. Every gift, no matter the size, is greatly appreciated. Consider how you would like to be involved in this effort.

Can I name something with my gift?
Your undesignated gift to the OFMP allows the Board to apply your contribution where it's needed the most. And, Yes, we'll soon develop Naming Opportunities for all giving levels. They will range from buildings to rooms, spaces, displays and more.

Can I make an anonymous gift?
Yes. Your gift will be acknowledged with a receipt and thank you, and will not be made public unless you so desire.

I don't have the means to give a "big" gift right now. Can I pledge over time and/or add a bequest to my will or include the OFMP as a beneficiary on my IRA?
Yes, gifts may be paid outright or pledged over a period of up to five years. And, a bequest is one of the easiest gifts to make. With the help of a financial or legal advisor, you can include language in your will or trust specifying a gift to be made to family, friends and/or the OFMP as part of your estate plan. With a retirement asset, like an IRA (using a beneficiary designation form provided by your IRA custodian), the full value of the gift is transferred tax-free at your death and your estate receives an estate tax charitable deduction. Life insurance is another effective planned gift.

Is my gift tax deductible?
Yes, because the OFMP is a federally recognized 501(c)3 non-profit charity, your gift is deductible to the extent allowable by law. Check with your tax advisor for specific advice.

How will my gift be recognized?
All gifts will be recognized. Permanent recognition displays will be included in the Old Fort complex. In addition, donors will be invited a campaign celebration, plus a "sneak peek" event.

Be sure to consult with your advisor for personal tax and estate planning guidance. And feel free to contact OFMP at 319-470-3642 to discuss options