Securing Saginaw’s Future

The power of giving together
Surprising wealth: Nebraska

Fillmore County, Nebraska
Population: 6,600

$1.16 billion
Surprising wealth: Michigan

Saginaw County, Michigan
Population: 200,000

$14.15 billion county-wide
$179,388 per household
Surprising wealth transfer in next 50 years

$53 trillion in United States

$972.24 billion in Michigan

$16.05 billion in Saginaw County
Wealth Transfer

A likely scenario for Michigan and the U.S.
Wealth Transfer

A likely scenario for Saginaw and Michigan
COMMUNITY WEALTH

Yesterday

- For generations, people lived entire lives close to their birthplace.
- Saginaw County wealth passed from generation to generation, but stayed in Saginaw County.
Today

- Many of the next generation no longer live in our county
- Once the wealth leaves our community, it will never return
PASSING WEALTH FROM ONE GENERATION TO THE NEXT

Three beneficiaries

Heirs

Taxes

Community
INCREASING OUR COMMUNITY’S SHARE

Invest 5% of our wealth as a legacy for future generations

Secure Our Future
5% for future generations

$128.91 million in 10 years

$802.5 million in 50 years
The next 10 to 20 years

Critical to Saginaw County’s future

Opportunity to retain 5% of Saginaw County’s wealth for future generations
Two possible scenarios

Saginaw County has a robust community endowment and a secure future; or,

Much of Saginaw County’s wealth has been transferred to communities in California, Arizona, Texas and beyond.
You’ve lived here
You’ve worked here
Saginaw County has been good to you

Give a gift to our future
Establish your Family Fund

$100,000 gift

YEAR 15

$100,000 in cumulative grants and services
$158,000 balance

YEAR 25

$200,000 in cumulative grants and services
$213,000 balance

YEAR 50

$625,000 in cumulative grants and services
$455,000 balance

Initial gift has been invested:

1 TIME

2 TIMES

6+ TIMES

LOOKING AHEAD

One gift, many generations

assumes 5% annual payout and 8.5% rate of return
If 5% of estates transfer to our community foundation endowment…

YEAR 10
$129 million charitable gifts
$34.2 million total grants
$148.3 million community endowment

YEAR 50
$802.5 million charitable gifts
$1.74 billion total grants
$1.79 billion community endowment

LOOKING AHEAD

Many gifts, many generations
The plan: Securing Our Future

Remember your heirs and tax obligations

Give to your community for good… forever
SECURING OUR FUTURE

The payoff

Source of pride for heirs

Stronger community for all
Endowed named fund

Targeting causes you care about most

Grants awarded in the name of your fund for generations to come
SECURING OUR FUTURE

Source of Pride

Give back to your community
Model values for the next generation
Honor family heritage
Stronger community

Causes that move you

- Enrich education
- Safeguard health
- Improve neighborhoods
- Cultivate arts
- Protect environment
- Strengthen families
Enrich education
GRANTS THAT MAKE A DIFFERENCE

Safeguard health
GRANTS THAT MAKE A DIFFERENCE

Improve neighborhoods

Neighborhood Renewal Services
of Saginaw, Inc.

Rebuilding Neighborhoods
Call 753-4900
GRANTS THAT MAKE A DIFFERENCE

Cultivate arts
Protect environment
GRANTS THAT MAKE A DIFFERENCE

Strengthen families
Charities that touch your life

Option to designate a local nonprofit

Saginaw-Bay Symphony Orchestra, Boys and Girls Club, Child Abuse and Neglect Council, YMCA of Saginaw County, Mid Michigan Children’s Art Museum, Children’s Zoo at Celebration Square, READ Association of Saginaw County, East Side Soup Kitchen
Ever-changing opportunities and needs

Community Legacy Fund

Together, we can grow a permanent endowment that is flexible and relevant through changing times. We can build security and prosperity for future generations.

GIVE THROUGH YOUR COMMUNITY FOUNDATION
Three easy giving strategies

- Give highly appreciated assets during your lifetime
- Give retirement assets through your estate
- Designate the Community Foundation as an insurance policy or retirement account beneficiary
• Assess your estate value
• Calculate a percentage for your community
• Determine most advantageous asset to give
Everyone can be a philanthropist