



COMMUNITY FOUNDATION
of Greater Dubuque

Your recent gift may qualify for an Iowa Tax Credit for 25% of your gift's value.

Endow Iowa Legislation allows taxpayers to take a 25% Iowa Tax Credit, in addition to the normal federal income tax deduction for a charitable donation. Tax Credits are allocated on a first-come, first-served basis until the available credits are all issued.

To apply for this credit you must:

- Complete the highlighted sections of the enclosed application.

You will receive a letter from the state with your tax credit information once the application has been approved by the state. If you have any questions, please call Luke at 563-588-2700.

**2021 Endow Iowa tax
credits have been depleted.
However, please return
your form quickly to
receive 2022 credits.**



Community Foundation
of Greater Dubuque

Endow Iowa Tax Credit Application

Eligibility Requirements

To be eligible for an Endow Iowa Tax Credit, a gift must be:

Made to an Endow Iowa Qualified Community Foundation or to a Community Affiliate Organization that is affiliated with an Endow Iowa Qualified Foundation.

Placed in a permanent Endowment Fund of the qualifying organization. Such funds are intended to exist in perpetuity, and the spend rate from the fund may not exceed 5% annually.

Placed in a permanent Endowment Fund that is for the benefit of a charitable cause or causes in the State of Iowa.



| Donor Individual(s) Information | Donor Company Information | Donation, Fund, and Foundation Information |
|--|---|---|
| <p>_____ Donor 1 Name</p> <p>_____ Donor 1 Social Security Number</p> <p>_____ Donor 1 Email Address</p> <p>_____ Donor 2 Name (if applicable)</p> <p>_____ Donor 2 Social Security Number</p> <p>_____ Donor 2 Email Address</p> <p>_____ Address</p> <p>_____ City, State, Zip</p> <p>_____ Telephone Number</p> <p><i>I hereby certify that the facts and figures presented in this application are true and correct.</i></p> <p>_____ Signature of Donor 1</p> <p>_____ Signature of Donor 2 (if applicable)</p> <p>_____ Date</p> | <p>_____ Company Name</p> <p>_____ Company Federal ID Number</p> <p>_____ Company Email Address</p> <p>_____ Address</p> <p>_____ City, State, Zip</p> <p>_____ Telephone Number</p> <p><i>I hereby certify that the facts and figures presented in this application are true and correct.</i></p> <p>_____ Signature of Company Official</p> <p>_____ Date</p> | <p>Amount of the charitable gift: _____</p> <p>Date the gift was made: _____</p> <p>Date the gift was placed in a permanent Endowment Fund: _____</p> <p>Name of the Permanent Endowment Fund in which the gift was placed: _____</p> <p><i>(Attach a copy of the fund agreement with this application or a board resolution/affidavit certifying compliance with applicable Endow Iowa requirements.)</i></p> <p><u>Community Foundation of Greater Dubuque</u> Community Foundation Name</p> <p><u>Nancy Van Milligen</u> Community Foundation Contact</p> <p><u>700 Locust St. Ste 195</u> Address</p> <p><u>Dubuque, IA 52001</u> City, State, Zip</p> <p><u>563.588.2700</u> Telephone Number</p> <p><u>nancy@dbqfoundation.org</u> E-mail Address</p> <p>If this gift was made to a Community Affiliate Organization, please provide the name of that Community Affiliate: <u>Foundation for Future of Delaware County</u></p> |
| <p>I hereby certify: That the Foundation listed above is an Endow Iowa Qualified Community Foundation; that the donation listed above is being made to a Permanent Endowment Fund which meets the requirement of an annual spend rate of 5% or less, and which will be used for the benefit of a charitable cause or causes in Iowa; and, that the facts and figures presented in this application are true and correct.</p> <p>I agree to provide access to records relating to this application to the Iowa Economic Development Authority (IEDA), or IEDA's designee, at any time upon IEDA's request.</p> <p>_____ Signature of Foundation President/CEO (or designee)</p> <p><u>Nancy Van Milligen</u> Printed Name of Signer</p> <p>_____ Date</p> | | |
| <p>Completed Applications should be mailed to:</p> <p>Community Foundation of Greater Dubuque 700 Locust St. Ste 195 Dubuque, IA 52001</p> <p>(Finalized application should be mailed by the Community Foundation to IEDA.)</p> | | |