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.

<table>
<thead>
<tr>
<th>Donor Individual(s) Information</th>
<th>Donor Company Information</th>
<th>Donation, Fund, and Foundation Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donor 1 Name</td>
<td>Company Name</td>
<td>Amount of the charitable gift:</td>
</tr>
<tr>
<td>Donor 1 Social Security Number</td>
<td>Company Federal ID Number</td>
<td>Date the gift was made:</td>
</tr>
<tr>
<td>Donor 1 Email Address</td>
<td>Company Email Address</td>
<td>Date the gift was placed in a permanent</td>
</tr>
<tr>
<td>Donor 2 Name (if applicable)</td>
<td>Address</td>
<td>Endowment Fund:</td>
</tr>
<tr>
<td>Donor 2 Social Security Number</td>
<td>City, State, Zip</td>
<td>Name of the Permanent Endowment Fund in</td>
</tr>
<tr>
<td>Donor 2 Email Address</td>
<td>Telephone Number</td>
<td>which the gift was placed:</td>
</tr>
</tbody>
</table>

I hereby certify that the facts and figures presented in this application are true and correct.

Signature of Donor 1

Signature of Donor 2 (if applicable)

Date

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.

Signature of Foundation President/CEO (or designee)

Nancy Van Milligen
Printed Name of Signer

Completed Applications should be mailed to:

Community Foundation of Greater Dubuque
700 Locust St. Ste 195
Dubuque, IA 52001

(Finalized application should be mailed by the Community Foundation to IEDA.)