



I would like more information on setting up an endowment fund and/or a one-time scholarship memorial with Southeast Polk Dollars for Scholars.

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____

Email _____

I would like to request to be contacted by a specific member of the SEP DFS executive cabinet or SEP DFS director:

Please return this form to:

Southeast Polk Dollars for Scholars
8379 NE University Ave.
Pleasant Hill, IA 50327

Fax: 515-967-4257

About Dollars for Scholars

The mission of the SEP Dollars for Scholars Foundation is to provide educational incentives and financial scholarships to Southeast Polk graduates who wish to further their education.

The goal of SEP Dollars for Scholars is to establish and administer a strong and growing endowment fund which will enable the Foundation to award a scholarship to all eligible SEP senior high and Harbor Alternative graduates who wish to further their education. Whether the student's goal is to attend a trade school, junior college, business college or university, SEP DFS will support these young people in pursuing their educational objectives.

Scholarships are awarded in May and paid when the business or college submits a bill to SEP DFS.

Flexibility in how the scholarships are paid:

- ★ One-time scholarship, usually for the first year of school
- ★ Renewable scholarships, including either two or four years

Flexibility in how the funds will be used:

- ★ 100% of the money given would be used for immediate scholarships **OR**
- ★ 30% of donated funds used for immediate scholarships and 70% placed in the endowment fund for future scholarships

The SEP DFS Foundation is a non-profit 501(C) 3 organization and contributions to the Foundation are tax deductible.



ENDOWMENT FUND



Gifts that keep on giving.

 Southeast Polk Dollars for Scholars®
8379 NE University Ave.
Pleasant Hill, IA 50327
515-967-4294
www.se-polk.k12.ia.us/dfs

★ What is an Endowment Fund?

An endowment fund is a place where individuals can give money and designate how proceeds of the gift are to be used.

The endowment fund is administered by the Dollars for Scholars Board. An Investment Advisory Committee provides recommendations for the Board.

An endowment fund...

- ★ is **an investment in our youth** and ultimately in our community. It becomes a personal commitment to benefit the citizens of tomorrow.
- ★ creates **new opportunities** needed to assist our youth in search of post-secondary education.
- ★ provides **personal satisfaction** that comes from contributing to a cause you believe in.
- ★ is a **gift that keeps on giving**, because the endowment fund uses only the earnings income to support the scholarship program.

★ Possible Gifts

Gifts of any size may be deductible for tax purposes. Actual tax savings will depend on the size of the gift and other factors. We recommend consulting with your tax adviser regarding procedures.

No matter the gift, your name will be placed in our Scholarship Recognition Book, which is updated yearly and provides the names of those who have given to the Foundation.

Gifts may include...

- ★ **IRA:** Since 2007, if you are 70 1/2 years old or older you have the opportunity to make direct transfers - free of taxes - from your IRA to eligible charitable organizations.
- ★ **Appreciated Securities:** At any age, a gift of stock gives you a charitable income tax deduction and capital gains tax savings.
- ★ **Memorials:** Remember a loved one or a special individual with a gift in his or her name.
- ★ **Life Insurance**
- ★ **Personal Property**
- ★ **Real Estate**
- ★ **Wills and Bequests**
- ★ **Trust Funds**
- ★ **Money**

★ Scholarship Memorials

Making a decision for a lasting memorial for a loved one can be difficult. It is especially so when you are making several other important decisions. SEP Dollars for Scholars offers ideas and answers in creating a memorial to aid high school graduates with furthering education needs.

It is your right to know how the memorial will make an ongoing impact for education opportunities for individuals in your community. Our organization can help you with the details. Your loved one will have a permanent recognition with this memorial.

Visiting with a SEP Dollars for Scholars representative will not mean you are obligated to a scholarship. It will be a time for explaining how you can develop a memorial in a special way to honor your loved one. Together you and SEP DFS will produce a practical and permanent tribute.

Your contact with SEP DFS can be with someone you request from the executive cabinet:

- ★ Roger Mahnke 515-967-4401 or 515-967-4181
- ★ Judy Porter 515-967-6524
- ★ Bob Sutton 515-967-4352
- ★ Verna Bowie 515-966-2150 or 515-979-2577
- ★ Lois Skinner 515-967-4264

Directors also available with information include:

- ★ Superintendent Tom Downs
- ★ Paulette Franklin
- ★ Rosemary Freel
- ★ Brett Handy
- ★ Kent Horstmann
- ★ Ruth Johnson
- ★ Robin Norris
- ★ Belinda Rinehart
- ★ Lori Slings
- ★ Jody Stagner

A personal thank you, suitable to be used for tax filing purposes, will be mailed to you as well as to everyone listed in donating toward the memorial scholarship you created.

