



Meet Legacy Society Member Steve Imler

Steve Imler retired more than two decades ago after co-founding a CPA/consulting firm that later became part of a Fortune 500 company. After getting involved with the Humane Society of Cobb County and Friends of the Strand Theatre in early retirement, Steve learned about Cobb Community Foundation and has served as a board member since 2012.

Steve incorporated his Donor Advised Fund at CCF into his estate plan, so that it will continue to benefit the community after he is gone while minimizing taxes for his heirs. He's worked closely with his attorney to direct his IRA to charities, including CCF as holder of his DAF. By leaving the IRA to charitable organizations, income taxes are avoided entirely.

“
Incorporating my fund at CCF into my estate plan gives me maximum flexibility to adjust future gifts to charities without having to change my will.”

A catalyst for a thriving community

Through mobilizing resources, empowering community problem solving, and equipping nonprofits to accelerate positive change, Cobb Community Foundation is improving quality of life in and around Cobb.

As a trusted steward of over **200 charitable funds** and **\$30 million** in assets, CCF harnesses the power of collective giving to ignite good that lasts for generations.



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Legacy Society

Create a lasting impact on the community you love



Join the CCF Legacy Society

The Legacy Society is a distinguished group of donors who have designated a gift to CCF in their will or estate plan or have created or made a significant contribution to a long-term or endowed charitable fund at CCF during their lifetime.

Planning an estate gift allows you to strategically accomplish both financial and charitable objectives. For many people, this includes honoring loved ones, providing for heirs while minimizing tax burdens, supporting this community they call home, and preserving the family name.



HOW WE HELP

CCF simplifies the giving process.

Establishing a fund at CCF as part of your estate allows you to:

- Support your favorite nonprofits or choose community grantmaking funds that align with your interests
- Manage future gifts to multiple entities, which you can change at any time cost-free
- Give almost any kind of asset, from real estate and stock to retirement plans and life insurance proceeds
- Avoid setup costs and ongoing management of a private foundation

To become a member of the Legacy Society, establish or make a meaningful contribution to a long-term or endowed fund during your lifetime or include Cobb Community Foundation in your will or other deferred gift plan.

Together, we will develop instructions for your gift, and then, upon your death, we will use your gifts according to your wishes. We will also handle all administrative tasks along the way, so neither you nor your heirs are burdened by them.

Call (770) 859-2366, visit cobbfoundation.org, or email ccfteam@cobbfoundation.org to learn more

WHAT YOU CAN GIVE

We can accept many kinds of assets, helping you maximize your giving and find tax advantages.



Cash



Business Interests



Life Insurance / Annuities



Appreciated Stock or Securities



Retirement Funds



Real Estate

MEMBER BENEFITS

When you create a legacy gift, you'll be invited to:

- **Name your charitable fund**
We encourage you to use your gift to honor the name of your family or loved ones. Of course, you may choose anonymity instead.
- **Attend special community events**
We'll introduce you to other generous people who have also provided for our community's future in their estate plans.
- **Be recognized in Cobb Community Foundation publications**
We'd like to give others the opportunity to follow your example of community stewardship and leadership. Of course, we also respect the wishes of those who prefer to give anonymously.