



# FOCUS ON PHILANTHROPY

Sept. 2023

A publication of  
UnityPoint Health -  
Allen Foundation

## Complimentary Estate Planning



**Dr. Eddie Thompson**  
Thompson & Assoc.

### Upcoming Dates:

— Tuesdays —  
October 10  
November 7

To learn more,  
call (319) 235-3960.

## New Members of Gerard Circle

**Rich Congdon**  
GNB Bank, Grundy  
Center  
Swisher & Cohrt, PLC

To learn more about  
Gerard Circle, call  
(319) 235-3960 or  
go to: [tinyurl.com/  
Gerard-Circle](http://tinyurl.com/Gerard-Circle)



**Hops for Hospice**  
Thursday, Oct. 19 | 5:30 to 7:30 p.m.  
New Location: Waterloo Center for  
the Arts

*Offering a wide array of micro-breweries and wine.*

Join us for an evening of music, craft beers and light appetizers to support the patients and families of UnityPoint Hospice.

Live music by —

# Brad & Kate



*Scan here for tickets.*

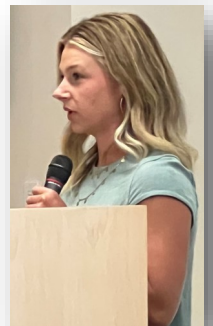
## Gerard Circle Recognition Reception Held July 13

Members of Gerard Circle gathered at Allen College to celebrate the generosity and philanthropic efforts of this special giving society. Gerard Circle is comprised of individuals and businesses who have contributed \$10,000 or more in their lifetime to the Allen Foundation or Allen College. Membership in Gerard Circle symbolizes a lifelong commitment to healthcare and healthcare education in our community.



*Linda Abel*

Guests heard from grateful patient, Linda Abel, who shared a touching story of her positive, patient experience. And grateful student, Breanne Pink expressed her gratitude for the financial help she received from donors while at Allen College. Both were powerful testaments to the amazing impact our Gerard Circle members have on UnityPoint Health–Waterloo.



*Breanne Pink*



**September 14-15**  
Meeting Rooms 1-3

The Allen College Alumni Association's Fall Plant Sale will offer bountiful mums, fall planters, house plants, and a variety of pumpkins and gourds!

**Thurs., 9/14: 7 a.m. to 5 p.m. | Fri., 9/15: 7 a.m. to 1 p.m.**





### Wish of the Month: Surgical Services —Staff Education and Certifications

Continued professional development and education of leaders and employees of any organization is extremely important, especially for clinical staff. This is why the UnityPoint Health—Allen Foundation has established the Surgical Services Education Fund to help promote further education and investments in our teams. This means that our team will be even more prepared to care for you should you need us at Allen Hospital. Higher level training and education also fosters engagement and unity.

To learn more about this wish and all of our current wishes, visit [unitypoint.org/giving/allen-foundation](http://unitypoint.org/giving/allen-foundation)

### Tax-Smart Charitable Giving

*Learn about qualified charitable distributions (QCD's).*

Individuals aged 70 ½ years or older who haven't explored the option of making charitable contributions directly from their IRA are missing out on a significant advantage. Did you know that you can give up to \$100,000 annually from your IRA to charities, leveraging what's known as a qualified charitable distribution (QCD) or IRA Charitable Rollover. Although a QCD doesn't yield an income tax deduction, it counts toward your minimum required distribution and isn't considered taxable income. With the recent doubling of standard income tax deduction amounts, many have lost tax benefits on charitable donations. Opting to donate directly from your IRA offers a tax-efficient alternative.

The QCD has transformed the way charitable contributions are made using IRA funds. Before its establishment, donors had to withdraw funds before making a charitable gift. This withdrawal would be considered income, partially offsetting the tax advantages of the charitable deduction for itemizers or providing no benefit for non-itemizers. The QCD eliminates this issue by not treating the withdrawal as income, extending tax benefits regardless of whether the donor itemizes deductions.

New rules introduced this year allow a one-time, \$50,000 QCD for funding charitable gift annuities or charitable remainder trusts. The donor or their spouse must be the annuitant or beneficiary, with subsequent payments treated as ordinary income. Looking ahead, the QCD amount will be adjusted for inflation starting next year. Despite its limitations, QCDs stand as one of the most advantageous opportunities within our tax code.

For more information about QCDs and their benefits for the Allen Foundation, call Mike Lind at (319) 235-3960.

### Notes from the Executive Director: Mike Lind

We are experiencing some change at UnityPoint Health—Waterloo.

Pam Delagardelle, our leader in Waterloo for over 10 years, has moved on to a new position at the UnityPoint Health corporate office. We are so happy for Pam and all she has done to support patients of the Cedar Valley.

With that change, Jenni Friedly has been named the Market President in Waterloo. Jenni grew up in the Cedar Valley and has been with Allen Hospital since 2009. Those of you that know Jenni, know that she is a great leader and we are so happy for her in this new role.

Despite these changes, I would like to remind those that support us, that we will continue to provide great care at Allen Hospital. Your investments as donors, will continue to support local services. Thanks to all of you, the Allen Foundation will continue striving forward, leading our mission and strengthening programs and services to the Cedar Valley.

*Thank you!*