5% for What?
Tangible Strategies to Maximize the 5% Transfer of Wealth Opportunity

Community Leadership Summit
Innovia Foundation
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What we know for certain

• This region has wealth.

• That wealth is transferring across the generations.

• Without action now, some of that wealth will follow your children, grandchildren or opportunities that lie outside this region.

• You can capture and invest some of that wealth to ensure continued prosperity for all parts of this region ... others have done it and this region can too!
Your Region’s Current Net Worth

$293 billion
...is estimated to transfer in your region from one generation to the other over the next 10 YEARS.

$41 billion
If just 5% of this transfer of wealth was designated for your communities, over...

$2$ billion

...could be invested in new endowments to positively impact your region for generations to come.
Investing 5% of your region’s transfer of wealth in new endowments would provide over...

$100 million

...in annual grantmaking in just 5 years.
Four Takeaways to Inspire Action
It’s not about the money, it’s about the dream.

Any place can do this.

Gives you resources to build the fund your place needs.

Set goals... Make progress!
Leading the Way with TOW!