

5% for What?

*Tangible Strategies to Maximize the 5%
Transfer of Wealth Opportunity*



Community Leadership Summit

Innovia Foundation

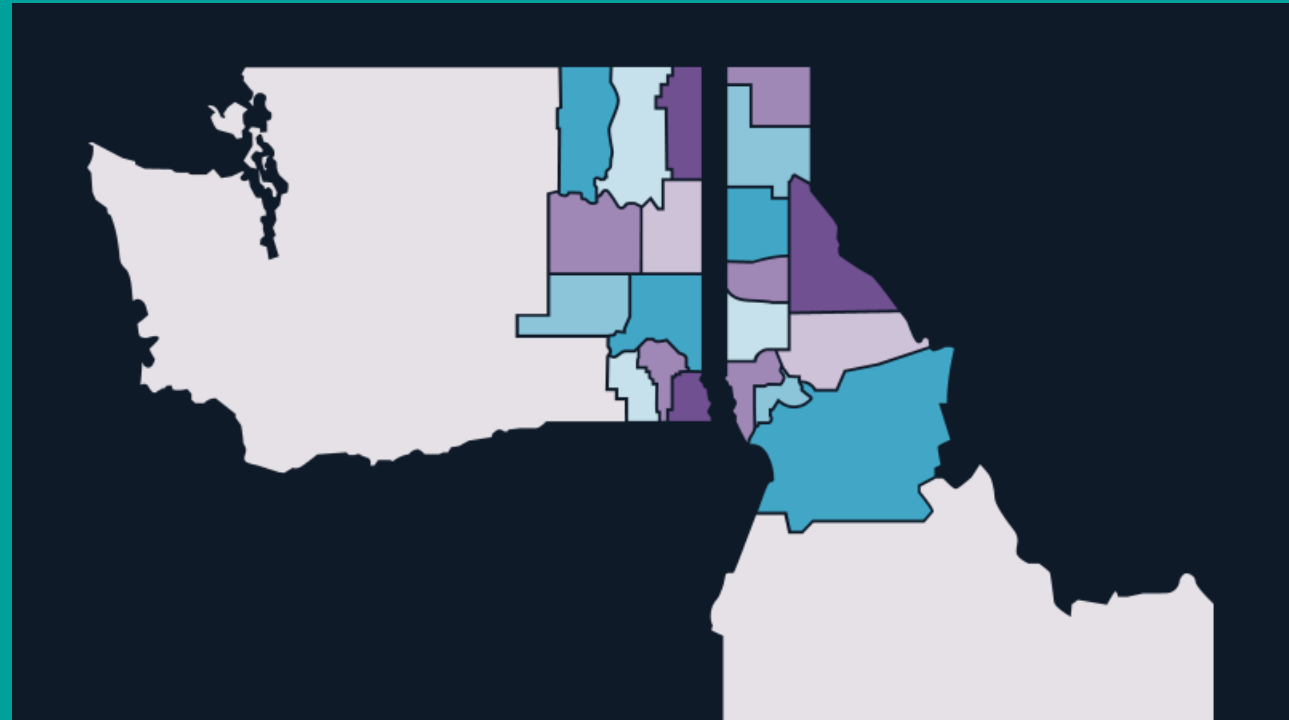
April 14, 2021

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!**

\$293 billion

**Your Region's Current
Net Worth**





\$41 billion

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

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!

