



The Purpose of Endowments

Giving an endowment must first—and always—stem from your goodwill to help our organization to continue our mission and service.

Why Consider an Endowment?



If you want to leave a legacy gift that ensures we will continue our mission long after you are gone, an endowment gift is worth considering.

Endowing Our Future...

We have established our endowment fund and, with a gift made to our endowment, you can support our cause *and* benefit in numerous ways including the following:

- You may be entitled to take a charitable income deduction for a gift made today.
- You can help ensure that our vital work is financially supported for years to come.
- You can leave a legacy that may inspire others.

Assemble an Expert Team



Your team should include a financial advisor, estate planning attorney, and a gift planning professional, as well as a consultation with your heirs and family members. Contact us by phone or email to ensure the nuances of the transaction are communicated. We would be happy to help you and your advisors as you consider it a gift of real estate to our organization.

How Does Our Endowment Work?

- The purpose of an endowment fund is to financially sustain the mission of the charitable causes you care about over the long run.
- The principal of your gift is kept intact, and we use the annual earnings, typically income and a portion of the capital growth, to fund current critical needs.

How Can You Make an Endowment Gift?

- An *outright gift of an asset*, such as cash, securities, real estate, business interests, collectibles, etc.
- A *bequest* through your will or trust. Bequests can be a dollar amount, asset, or percent of your estate.
- A *beneficiary designation gift of assets*, such as the following:
 - Checking, savings, and mutual fund accounts
 - Retirement accounts, such as an IRA, 401(k) or 403(b)
 - Life insurance policy
 - Commercial annuity
 - Charitable Life Estate, which is a remainder gift of your personal residence or farm. You remain living in your home.
 - Charitable Life Income Plans, such as a charitable gift annuity or charitable remainder trust. These plans enable you to make a future gift to endow our work while enhancing your current financial security.

Contact Us

To learn more about how you can make a significant gift to endow the future of our organization through one or more of these plans, please get in touch with us. We would be delighted to talk with you and answer any of your questions.

The information in this publication is not intended as legal or tax advice. For such advice, please consult an attorney or tax advisor. Figures cited in any examples are for illustrative purposes only. References to tax rates include federal taxes only and are subject to change. State law may further impact your results.