

Why Endowed Funds Work

John and Mary Lewis have been giving to [ABC] Charity for many years. In fact, we've grown downright dependent on their annual generosity. We've become true partners in this great enterprise. Consequently, when they are gone, the absence of their giving will have remarkable impact.

John and Mary know this and are doing something to make sure their giving never runs dry. They are taking steps, through their will, to create the *John and Mary Lewis* Endowed Fund. A portion of their estate will be set aside for a special fund that will generate annual gifts to continue the giving they are doing now.

Endowed funds work well for people like John and Mary. Here are three reasons why:

1. Endowed Funds are Perpetual

Like an artesian well, endowed funds keep giving and giving and giving. They allow people like John and Mary to "lock in" their giving. Buildings may crumble and people will come and go, but endowed funds are designed to last.

In the future, family members such as children and grandchildren will be reminded of John and Mary's involvement with [ABC] -- every year -- and the value of making regular gifts to support worthy causes. What a wonderful legacy to leave behind!

2. Endowed Funds are Protected

Endowed funds at [ABC] are set aside and kept separate from operating and capital fund accounts. John and Mary have the assurance that their fund will be secure. A written agreement will be on file and the terms will be carefully followed.

3. Endowed Funds are Personal

While it is possible, and sometimes desirable, to

create an unnamed, unrestricted endowed fund, many people want their fund to bear a person's name. And they may want to tailor the purpose of their fund to benefit a specific area of interest. They appreciate the flexibility and the opportunity to personalize their "artesian well."

[ABC] Charity has developed sound policies for creating and managing its endowed funds. This information is available upon request. Also, our gift planning director, [add name], is able to show you the various ways you can make an endowed fund dream come true -- whether now through a current gift, or later through your estate plan. S/he will be happy to visit or correspond with you about this exciting area of philanthropy.

The response form below will let us know how to assist you. If you fill it out and send it in, we will respond immediately. Or if you'd rather call, please contact [name] at the office (888-123-4567).

(Please complete and return this reply form.)

Dear Friends at [ABC] Charity:

- ☐ Please send me more information about the endowment fund program at [ABC] Charity.
- ☐ I am interested in setting up an endowment.
- ☐ Please send me information about the [ABC] Heritage Society.

Name: _____

Address: _____

City: _____

Province: _____ Postal Code: _____

Phone: _____ Email: _____

Mail this form to:

[ABC] Charity, 123 Main Street, Anytown