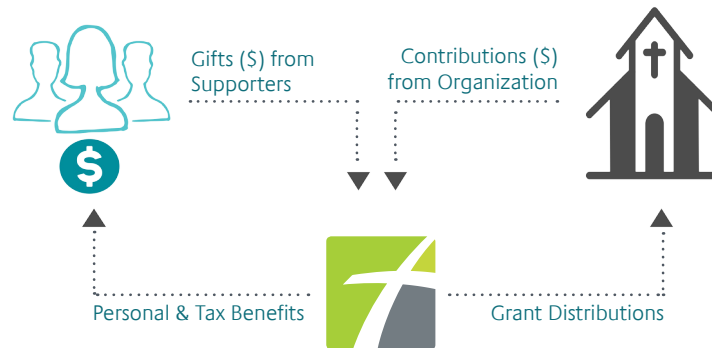


ENDOWMENT FUNDS FOR CHURCHES & FAITH-BASED NONPROFITS

HOW AN ENDOWMENT FUND WORKS

Establishing an endowment fund at InFaith Community Foundation is simple. Gifts of cash, securities, real estate and all other illiquid assets can be made, as can bequests, beneficiary proceeds and life insurance. Supporters can also make gifts and receive lifetime payments through charitable gift annuities and charitable remainder trusts. InFaith charitable planning specialists are available to assist supporters with their gifts.



A \$25,000 minimum is required to establish an active endowment fund. Once the endowment fund is established, distributions can be made at any time. To help track the endowment fund, a designated member of the endowment fund committee is provided with quarterly statements and online access to the endowment fund's activity. The organization may request grant distributions in varying amounts at any time, directing grant dollars to the programs it designates. A zero balance shell fund option is available to those interested in starting a planned giving program, while raising money for the initial contribution.

BENEFITS TO THE ORGANIZATION

Administration. InFaith assumes complexities of administering the endowment fund, including accounting and investment responsibilities, transaction assistance and gift planning consultations. The organization gains significant professional expertise at a low cost and an investment portfolio typically not available to smaller endowment funds. They may choose the appropriate allocation for their endowment fund's needs.

Investment Expertise. The organization benefits from InFaith's relationship with our investment advisors, Cambridge Associates and Veris Wealth Management, two leading advisors to nonprofits nationally.

Gift Options. Those who support the church or faith-based nonprofit have access to charitable gift arrangements, such as charitable remainder trusts and gift annuities in addition to other gift options.

Flexibility. The endowment fund can be structured to reflect special-purpose gifts and the need for particular distribution arrangements.

Marketing Assistance. InFaith provides an *Endowment Marketing Toolkit* to help build awareness and promote planned gifts to build the endowment fund. This kit includes pre-written and designed content, such as a marketing calendar, bulletin blurbs, newsletter articles, letters, social media posts and more.

InFaith Community Foundation is a national charity with a mission to serve donors, spread joy and change lives. Through InFaith, giving is customized to each donor's charitable interests and financial circumstances. InFaith is a proven steward of these gifts, earning consistently high ratings from Charity Navigator and GuideStar for sound fiscal management, transparency and commitment to excellence. Together with donors, InFaith grants millions of dollars annually to charities serving local, national and global communities. To learn more, visit inFaithFound.org.

inFaithFound.org 625 FOURTH AVENUE SOUTH SUITE 1500, MINNEAPOLIS, MINN. 55415
p 800-365-4172 f 612-844-4109
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