



# Designated fund

## GUARANTEE ANNUAL INCOME FOR YOUR SELECTED NONPROFITS

A designated fund provides guaranteed annual support to nonprofits you choose. If the designee goes in a completely different direction or out of business, your fund remains intact and grants are made to a similar organization.

### **A designated fund is the right fund for you if you want to:**

- Give your charitable resources to select nonprofit organizations over time, rather than all at once — while still making just a single gift into your fund.
- Rely on the Foundation's investment and fund administration expertise to make annual disbursements over time to the nonprofits you choose.
- Ensure that your resources will serve the organizations you designate in perpetuity. If the nonprofits you choose go in a completely different direction or out of business, the Foundation will find another nonprofit in good standing doing similar work to become the beneficiary of your fund. You can also name alternate beneficiaries of your fund.
- Have your fund's name included in grant award letters or choose to give anonymously.
- Make additional tax-deductible gifts of any amount into your fund at any time. You can also invite others to contribute to your fund.
- Choose how you want your charitable gift invested, with returns going back into the fund for future payments to your selected nonprofits.

Each year, grant distributions will be made from the fund using the Foundation's charitable disbursement rate.

**The minimum contribution to establish a designated fund is \$10,000 per organization.**

### **Ready to do more with your giving? Let's get started.**

Please be in touch to discuss how we can help turn your charitable passion into action — and make your giving easy, rewarding and fun.

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