

*Rooted In Faith. Endowing Your Legacy.*



## MAKE A FOREVER GIFT

Endowed Funds are funds created in perpetuity, of which the principal is never invaded. The principal is the initial gift given to establish the fund. Endowment funds grow through sound investment as well as additional donations. Annual distributions are made from investment earnings according to donor intent. Many endowment funds are created through gifts from wills or trusts, however, a significant number of donors choose to fund their endowments while they are still living so they can see the impact of their gifts. There are numerous ways to fund an endowment with The Catholic Foundation, including gifts of cash, securities, sale of property, distributions from retirement accounts and more.



### The Benefits

- ✦ Establish a lasting Catholic legacy by providing a perpetual annual source of revenue for the Catholic entity of your choice.
- ✦ Ensure your gift will always be used as you intended.
- ✦ The Catholic Foundation manages the fund and distributes the income to your selected Catholic organization.
- ✦ Donations are invested in accordance with the USCCB guidelines for Socially Responsible Investments.
- ✦ All gifts are tax deductible.



### The Features

- ✦ Open an Endowment Fund with a minimum gift of \$5,000.
- ✦ Open with cash, marketable securities, IRA distribution or other assets.
- ✦ Designate to your parish or the Catholic organization of your choice or leave unrestricted to serve the greatest need.
- ✦ Ability to fund at death with an estate gift or designation in a will.
- ✦ Make a bequest from your trust.

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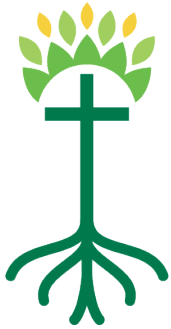
## How does an Endowment Fund work?

### Make a Gift

Donate cash or easily transfer appreciated assets (such as stock) to establish an Endowment Fund and avoid having to pay capital gains taxes while maximizing your philanthropic dollars. Or use your IRA required minimum distribution and reduce your taxable income.

### Investment

Funds are invested in accordance with the United States Conference of Catholic Bishops guidelines for Socially Responsible Investments. You, and others, can continue to make additional tax-deductible contributions after the Endowment Fund is established.



### Fund

Investment earnings and interest are added to the fund balance allowing it to grow year over year.



Scan the  
QR code to  
learn more.

### Endowment Distribution

Following The Catholic Foundation's distribution policy and in line with the fund agreement, a distribution is made annually to the agreed upon Catholic beneficiary.

*The Catholic Foundation does not provide legal, tax or financial advice.*

## About The Catholic Foundation

The Catholic Foundation is an independent, non-profit, tax-exempt 501(c)(3) organization founded in 2010 to cultivate financial stewardship and generosity by providing an avenue for faith-based giving to provide perpetual support for the parishes, schools, programs and ministries of The Archdiocese of Mobile. The Catholic Foundation is governed by a Board of Directors that includes Catholic clergy and lay Catholic leaders from across central and south Alabama. The Board establishes and oversees the investment policies to grow funds while safeguarding principal and adhering to the socially responsible investment (SRI) guidelines established by the USCCB. The Foundation is accountable to both donors and recipients.

[CatholicFoundationAlabama.org](http://CatholicFoundationAlabama.org)

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