

Create an Endowment

Your Legacy Now & Forever

You already know the joy that comes from making a difference. When you join us in our mission, you have the immediate satisfaction of seeing your gift in action. An endowment gives you that same feeling, plus something more. It offers you the feeling of accomplishment knowing your impact will continue forever in your name, automatically.

A Simple Agreement

Something lasting forever sounds complicated, but it really is simple. An endowment has three essential parts:

- You make a gift to establish an endowment
- We sign an agreement with you detailing how the gift will be invested and distributed
- We handle the investments and distributions

How the Endowment Agreement Works

When you are considering an endowment, we work with you to word it, so it follows your wishes for all time, having the effect you desire. We create an agreement with all the details so you will know how the endowment will be invested and distributed.

The names and images shown here are representative of typical donors and may or may not be actual donors to the organization. Under federal rules your benefits may be different from this example. Please contact us for your specific benefits.

22KJ45

Want More Details?



If you wish to join or want more information, please complete this form.

- ☐ Please contact me. I want to know more about endowment benefits.
- ☐ I have included your organization in my will or trust and want to know if I can create an endowment.
- ☐ Please send me your free estate planning kit.

The best way to contact me is by:

- ☐ Email
- ☐ Mail
- ☐ Telephone

Name

Street

City

State/Zip

Phone

Email

All inquiries are treated with complete confidentiality.

This information is not intended as tax, legal, or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation.



Midwest Methodist Foundation
155 North Wacker Drive, Suite 4250
Chicago, IL 60606
312-803-4801

contact@midwestmethodist.org
MidwestMethodist.org | MethodistGift.org

Copyright © 2023 Crescendo Interactive, Inc. Used by permission.

A *Legacy* that Lasts *Forever*



You already make a difference for our mission. What if you could continue that difference every year forever? Learn how an endowment benefits you.



Hassle-Free Future

We Do the Work - You Enjoy the Legacy

A major feature of the endowment is that once it is started, we do all the work. We invest the funds along with other endowed funds, creating economy of scale to maximize your endowment. We invest all our endowed funds according to our endowment policy. Set by our board, it generally provides that endowed funds are invested to produce stable, predictable growth. Each year a set percentage from your endowed fund is distributed according to your endowment agreement.

If the endowed fund grows, so does your annual distribution. Your impact may become greater each year. You can also put a cap on your fund, so it ends after a certain term of years.

Possible for Everyone

You might think endowed funds are only for the wealthy. However, anyone can start one. You can create an endowment with your will or trust. It does not have to be created in your lifetime. In addition, you can fund it with an array of assets. Real property (including life estates), life insurance, appreciated stock, investment accounts, jewelry and more are all possible sources of endowed funds.



Now & Later

You Set the Pace

You can start your endowment now with a modest investment. You get to see the immediate benefits of your endowment at work each year. As you do, you can choose to add more to it. Plus, you can always supplement your endowment in your estate plan. The scope and impact of your endowment are up to you.

All That & Tax Benefits Too

If you wish to leave a legacy for the cause you love, we can help you craft an endowment that will create the impact you want forever. You can create your endowment now or later and use various assets to do it. Of course, depending on the asset you use and when you use it, you receive an income tax deduction, capital gains benefits, and possibly lower your estate tax bill.

Here to Help You

To learn more about how an endowment can help you achieve your goals, please contact us. We welcome the opportunity to answer further questions and work with you and your advisors.