



ENDOWMENT FUNDS



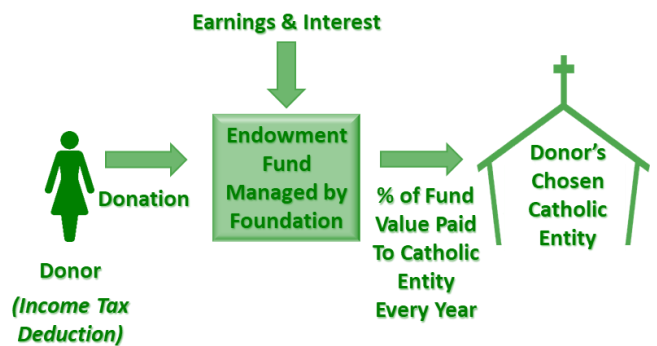
Make a Forever Gift

An Endowment Fund provides a permanent source of income to the Catholic organization of your choice. This fund is designed to function in perpetuity, making it possible for you to ensure long-term financial support and sustainability to your Parish, School, Diocese or other Catholic program or ministry about which you care most. Once established, anyone can make additional contributions to the fund in any dollar amount. You can choose to support an existing endowment fund, start your own named fund, or establish a fund to honor or memorialize friends, family or other loved ones.



You can...

- Open an Endowment Fund with a minimum of \$10,000
- Designate any Catholic organization, or leave unrestricted to serve the greatest need
- Open with cash, marketable securities or other assets
- Avoid capital gains taxes on long-term, highly appreciated assets
- Make a bequest from your will or trust



Key benefits

- Provide a perpetual annual source of revenue for the Catholic entity of your choice
- Ensure your gift will always be used as you intended
- You can add to your existing Endowment Fund, or start one, with a gift or designation in your will, trust, or beneficiary designation
- Donations are invested in accordance with the United States Conference of Catholic Bishops guidelines for Socially Responsible Investments
- You can receive a reduction in income taxes



ENDOWMENT FUNDS

How does an Endowment Fund work?



MAKE A GIFT



INVESTMENT



FUND GROWTH



DISTRIBUTION

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 growth



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

Endowment distribution



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



Scan the QR Code to learn more.

Let's talk

About the Catholic Community Foundation

The Catholic Community Foundation of Southwest Florida began operating in 2004 to help donors create lasting legacies uniquely aligned with their Catholic values and beliefs. The Foundation works with donors to provide long-term support and sustainability to the ministries, programs, and entities about which they care most.

Why the Catholic Community Foundation

The Foundation supports the mission of Christ in the Diocese of Venice and beyond and was created as an independent 501(c)(3) not-for-profit to help safeguard donors' assets and to ensure that donations will always be used in alignment with donors' wishes. The Foundation also invests all donations in Catholic-screened investments in keeping with our Faith.

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