



CATHOLIC FOUNDATION  
OF NORTHEAST KANSAS



## ENDOWMENT FUND

### Make A Forever Gift

An Endowment Fund provides a source of annual income to a Catholic organization of your choice. This fund is designed to function in perpetuity, making it possible for you to ensure long-term financial support to your chosen cause. Once established, anyone can make additional contributions to the fund in any dollar amount.



#### You can...

- 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, trust, or policies



#### Key benefits

- Fund at death with a gift or designation in your will, trust, or beneficiary designation
- Invested in accordance with the United States Conference of Catholic Bishops Socially Responsible Investments Guidelines
- Avoid capital gains taxes on long-term, highly appreciated assets
- Reduction in income taxes
- Provide a perpetual annual source of revenue for the charity of your choice



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# How does an Endowment Fund work?



MAKE A GIFT



INVESTMENT



FUND GROWTH



DISTRIBUTION

## Make a gift



Donate cash, real estate, stock, or insurance to establish an Endowment Fund. Or roll-over your IRA mandatory distribution.

## Investment



Funds are invested in agreement with the United States Conference of Catholic Bishops Socially Responsible Investment Guidelines. You can continue to make additional tax-deductible contributions.

## Fund growth



Each year the endowment fund generates income, allowing the fund to grow year over year.

## Endowment distribution



Following The Catholic Foundation's distribution policy and in-line with the fund agreement, distributions are made semi-annually to the agreed upon beneficiary.



Let's talk

### About Us

The Catholic Foundation's mission is to promote the spiritual mission of the Catholic Church, collaborate with parishes and institutions, build endowed funds, and steward responsibly the funds entrusted to the Foundation by inspiring giving and assisting donors to provide for the long-term needs of the Archdiocese of Kansas City in Kansas.

### Why Us

The Catholic Foundation offers a way to leave a legacy uniquely aligned with Catholic values and beliefs. Additionally, the Foundation invests all funds in accordance with the United States Conference of Catholic Bishops guidelines for Socially Responsible Investments.



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