

Endowments: The Ultimate Legacy Gift



A powerful, lasting way to support the mission you care about — forever.

An endowment is more than a donation. It's a long-term investment in a nonprofit's future, providing ongoing funding year after year.

By establishing an endowment, your gift can support the mission you care about today and for generations to come.

What is an Endowment?

An endowment is a gift usually of cash, stock, or other long-term assets which are invested for growth.

The original gift (called the *principal*) stays invested, and a small portion (typically 4-5% per year) is disbursed annually to the nonprofit to support its work.

Why Create an Endowment?

Endowments offer a sustainable stream of funding that lasts into perpetuity.

1) Maximize Your Tax Benefits

Support the causes you care about long after your lifetime.

2) Sustainable Funding

Organizations can count on annual income to support long-term planning and critical programs.

3) Mission-Aligned Flexibility

Nonprofits can direct funds to the areas of greatest need while respecting your preferences as a donor.

If you're ready to explore legacy giving, Infinite Giving can help set up and manage your endowment with simplicity and care.

Have questions? Email Heather Carroll at hcarroll@mywit.org.

How Endowment Gifting Works



Here's how simple the process works for nonprofits using Infinite Giving.

1) Initial Gift

Donors can create an endowment with a minimum gift, often around \$25,000.

Many nonprofits also seed their own endowment using operating reserves usually \$100,000+.

2) Investment Strategy

The funds are invested in a balanced, diversified portfolio (often 60/40 or 70/30 stocks/bonds). Strategy is tailored to the nonprofit's goals and risk tolerance.

3) Annual Disbursement

Each year, typically 4-5% of the endowment is distributed. Depending on the type of endowment, some wait a few years before beginning to start distributions thus allowing the fund to grow.

3) Inform the Nonprofit

While funds are usually unrestricted (used where most needed), donors can express a preference (e.g. scholarships, programming). We help document and honor those wishes through clear endowment guidelines.

LET'S BUILD YOUR LEGACY

Whether you're ready to establish your own endowment or just exploring your options, we're here to help.

Endowments can be personalized to reflect your values, priorities, and vision. You can even involve your family or give in honor of someone special.

Please reach out to Heather Carroll at hcarroll@mywit.org to get started building your endowment today.