



**CATHOLIC  
FOUNDATION**  
OF WEST CENTRAL WISCONSIN

P.O. Box 4004 | La Crosse, WI 54602  
608.519.9892 | cfwcw.org



## 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...

- Open an Endowment Fund with a minimum of \$100,000
- Designate any Catholic organization, or leave the Fund 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

- The Catholic Foundation's administrative fee is 75 basis points (subject to change), or three quarters of one percent on an annual basis. This is the only fee/cost to you
- 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' guidelines for Socially Responsible Investments
- 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

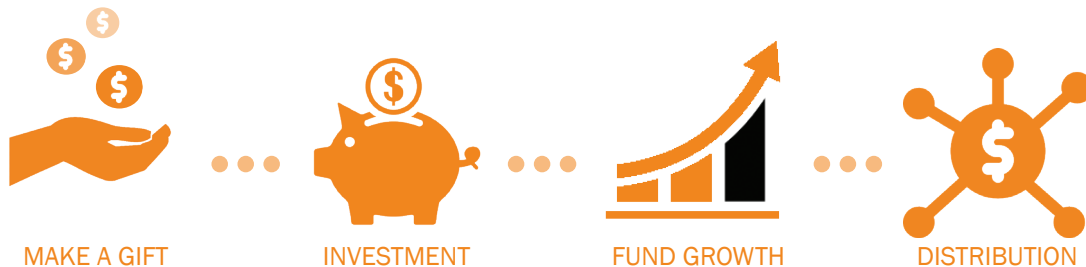
To learn more and to create your own custom giving plan, please contact:

608.519.9892 | [info@cfwcw.org](mailto:info@cfwcw.org) | [cfwcw.org](http://cfwcw.org)



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## How does an **Endowment Fund** work?



### Make a gift



Donate cash, non-publicly traded assets, or easily transfer appreciated stock to establish an Endowment Fund. Or roll-over your IRA mandatory distribution.

### Investment



Funds are invested in accordance with the United States Conference of Catholic Bishops' guidelines for Socially Responsible Investments. You can continue to make additional tax-deductible contributions.

### Fund growth



Each year the endowment fund generates income allowing the fund to grow year after year.

### 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 beneficiary.

## Let's talk

#### Who We Serve

The Foundation assists donors throughout the 19 counties of West Central Wisconsin in creating a meaningful impact through planned giving and charitable fund management. Additionally, the Foundation works closely with the charitable entities that the donors designate as beneficiaries, as well as with Catholic organizations who apply for grants.

#### Why Choose Us

The Foundation ensures Catholics a way to leave their legacy uniquely aligned with their Catholic values and beliefs. Donors enjoy the satisfaction of knowing that their gift directly supports the Catholic organizations that they choose.