



Endowment Building Program & e-Tools

More than 75 nonprofit organizations have established endowment funds at the Community Foundation of Northern Colorado. Many nonprofits started their funds to help them develop greater financial stability and to provide their donors with a way to support them with planned or legacy gifts. Nonprofits not only benefit from pooled investments and the Foundation's administrative services and endowment building expertise, they also receive the helpful materials and tools provided in our endowment building toolkit.



We can help you build your endowment fund and a strong future for your organization in three important ways:

Help your donors understand the value of endowment and legacy giving

Our experience shows that many people don't understand how endowments and legacy or planned gifts work, but once they do they are willing to help build a permanent source of financial support for the causes they care about. We can meet with your and your prospective donors to explore their giving options. You'll find marketing materials for your website and publications available for download on our website.

Support your staff and board members

The many endowment giving options, both current and deferred, can be confusing for staff and board members. We can help. We can meet with the

members of your staff and board to provide them with a basic working knowledge of the most common types of gift planning options. Our step-by-step guide to endowment building will help staff and board members understand the options available to them.

Finalize gifts to endowment funds for your organization

Whether your donor has met with a member of our staff or wishes to remain anonymous, we can prepare fund agreements and sample gift language. In each case, we recommend that gift proposals and agreements be reviewed by the donor's professional advisor(s).

To help your donors understand the value of endowment and legacy giving, let's start with the basics.

What is an endowment fund?

An endowment is a permanent fund that provides income each year to support a charitable cause. Endowment funds at the Community Foundation of Northern Colorado are professionally managed to ensure the funds remain strong over time. Each year, 4.5% of the average fund balance becomes available for distribution.

Why is an endowment important?

An endowment provides essential stability. It facilitates the strategic use of funds because it allows an organization to plan on the income from one year to the next. The endowment fund also presents an excellent option for donors who want to make legacy or planned gifts.

What is a legacy or planned gift?

Legacy or planned giving describes a variety of giving vehicles that allow donors to support charity during their lifetime and/or after their deaths, while meeting their current income needs and providing for their heirs. Planned giving is typically done in conjunction with estate planning and is a viable option for donors of all income levels.

Who makes gifts to the endowment?

Donors can support an organization's future with an endowment gift of any size and of all types, including:

- Gifts made through your will or trust;
- Gifts of retirement plan assets;
- Gifts of life insurance;
- Gifts that pay you income for life;
- Gifts through a charitable lead trust.

Although most donors contribute cash or publicly traded stock, we also accept closely-held stock, real estate, tangible personal property, or assets of a private foundation.

What is a named fund?

A named fund is a permanent fund that honors an individual or family and benefits the organization they care about most. Named funds are created with a gift of at least \$25,000. The gift may be current or deferred, as in the case of a gift made through a will.

Are endowment funds restricted in purpose?

Most endowments provide unrestricted support to a nonprofit organization. It is also possible to establish funds to benefit specific purposes within an organization. Individuals and families often create funds to honor an individual and to support a program of special importance to them.

Who are your potential legacy donors?

Experience has shown that the people most inclined to include charitable causes in their estate plans are those who:

- Are loyal to your mission, as demonstrated by consistent annual gifts of any amount;
- Volunteer for your organization;
- Express a desire to give back to the community;
- Express a desire to meet others' expectations of them;
- Are at any income level. Wealth is not an indicator of an individual's likeliness to make a legacy gift.

Creating a Legacy Society

A legacy society offers your organization a way to recognize and thank those individuals who have taken the extra step of including your cause in their long-term plans. Just like any donor recognition, a legacy society may also help encourage others to consider making similar gifts themselves. Here are some tips for establishing your own Legacy Society:

- Consider naming the group in honor of something unique and meaningful for your organization.
- Make sure you have at least a handful of individuals who will qualify for the Legacy Society before announcing it.
- Determine criteria for membership in the Legacy Society; they should be broad and recognize all who have included your organization in their long-term planning.
- Highlight Legacy Society members in your organization's publications and events.
- When announcing the start of your Legacy Society, offer to those who make planned gifts during the first year of the Society's existence the opportunity to become founding members.
- Consider hosting an annual reception or event for Legacy Society members to publicly thank them for their support.

A Checklist for Endowment Building and Legacy Giving

Now that you are ready to build your nonprofit organization's endowment fund and encourage legacy gifts, the Community Foundation's Endowment Building Toolkit can provide you with the effective tools you need. You'll find downloadable fact sheets, articles, postcards, solicitation letters, and advertisements that can help you build awareness about how endowment and legacy gifts can create a brighter future for your organization.



Here's a simple checklist to help walk you through the steps to build your endowment. Our team is available to provide you with additional program support along the way.

Educate and engage your organization's leadership

- Make sure you can articulate what a strong endowment will do for your mission and future.
- Engage your board and committees with endowment building and legacy giving through a brief presentation by the Foundation staff.

Communicate the value of endowment building and legacy giving

- Make sample bequest language and your legal name easily available; include one-line legacy or planned giving messages in your various publications and on your website.
- Print and distribute endowment and legacy giving fact sheets at your offices, board and committee meetings, and in appropriate mailings.
- Include advertisements and articles about endowment building and planned giving in your publications and on your website.
- Print and mail postcards that highlight endowment building and planned giving.

- Print and display posters at your facilities.
- The more your prospective donors see your messages, the more likely they will be to increase their giving.

Engage, educate and recognize endowment and legacy donors

- Identify prospective endowment and legacy donors.
- Mail solicitation letters to prospective legacy donors.
- Follow up on the mailings by having your staff and/or volunteers contact the prospective donors. The Foundation can provide detailed gift examples and meet with donors on your behalf.
- Provide contact information for estate and/or financial planners to donors who request assistance.
- Establish a Legacy Society to recognize and thank your donors.

To learn more about the Community Foundation of Northern Colorado's Endowment Building Toolkit, please contact our Community Engagement Team at (970) 224-3462 or grants@nocofoundation.org.

To download any of our e-Tools, please visit www.NoCoFoundation.org.



About the Community Foundation of Northern Colorado

The Community Foundation is a nonprofit, public foundation working to build permanent endowments for the benefit of charitable causes and organizations in Northern Colorado. It manages hundreds of individual charitable funds and serves a unique leadership role by bringing people and resources together around important local issues. More than 75 local nonprofit organizations have their endowments housed with the Community Foundation, and many individuals and businesses have established donor advised funds.

The Community Foundation proudly serves our region by promoting local philanthropy. We are the regional leader in building a more engaged, philanthropic, and visionary community by strategically connecting people with the causes they care about most. Through our annual grant and program distributions, we play a key role in enhancing the extraordinary quality of life the Northern Colorado region offers its residents.



Since 1975, the Community Foundation of Northern Colorado has been connecting people who care to the causes they care about. The Foundation serves as the long-term steward for charitable funds — a multifaceted role that involves receiving and managing complex gifts, acting as the trustee of charitable trusts, providing numerous investment options for donors, and accounting for each individual fund.



Providing Long-Term Support for Our Mission

Endowment Funds at the Community Foundation of Northern Colorado

What is an endowment fund?

An endowment is a permanent fund that provides income each year to support a charitable cause. Endowment funds at the Community Foundation are professionally managed to ensure the funds remain strong over time. Currently, Community Foundation funds pay out 4.5% of the average fund balance. For example, a \$100,000 fund provides about \$4,500 of support each year.

Why is an endowment important?

An endowment provides essential stability and is a permanent source of funding. It facilitates strategic use of funds and allows the organization to plan on the income from one year to the next. An endowment fund presents an excellent option for donors who want to make legacy or planned gifts.

Who makes gifts to an endowment?

Anyone can contribute to an organization's future by making a gift of any size to its endowment. Donors support their favorite organizations in carrying out their missions, now and in the future.

What form can an endowment gift take?

Endowment gifts take many forms. The Community Foundation provides professional gift planning assistance and facilitates gifts of all types, including:

- Cash
- Gifts of non-cash assets such as stock and real estate
- Gifts through your will or trust
- Gifts that pay you income for life
- Gifts of retirement plan assets
- Gifts of life insurance

What is a bequest?

A bequest is a gift made in a will or trust. Because a bequest is flexible and revocable, it is the most common type of legacy gift. With a gift made in your will to an endowment fund, you can continue your support of the organization mission far into the future.

What is a named fund?

A named fund is a permanent endowment that honors an individual or family and benefits the cause they care about most. Named funds at the Community Foundation of Northern Colorado are created with a gift of at least \$25,000. The gift may be current or deferred, as in the case of a gift made through a will. Each year, the charitable organization receives income from the named fund.



Are endowment funds restricted in purpose?

Most endowment funds at the Community Foundation provide unrestricted support to advance the mission of a nonprofit organization. It is also possible to establish a fund to support a specific purpose within an organization. Individuals and families create often funds named to honor an individual and to support a program of special importance to them.

Is there a minimum size for gifts to an endowment fund?

No, there is no minimum. A nonprofit organization benefits, now and in the future, from endowment gifts of any size. Please consult your accountant or tax attorney regarding your financial and estate planning.

How can I get started?

The Community Foundation provides support for a full range of charitable gift planning options. Call us for more information about ways to create your charitable legacy. We will be happy to supply you with detailed gift examples based on your own circumstances.

To learn more, please contact our Community Engagement Team
at (970) 224-3462 or grants@nocofoundation.org.

Since 1975, the Community Foundation of Northern Colorado has been connecting people who care to the causes they care about. The Foundation serves as the long-term steward for charitable funds — a multifaceted role that involves receiving and managing complex gifts, acting as the trustee of charitable trusts, providing numerous investment options for donors, and accounting for each individual fund.



Endowment Building Solicitation Letters and Response Cards

You can create awareness about building your organization's endowment a number of ways. Even though we may live in the digital age of communications with email and social media, there is something to be said about the power of the good old-fashioned letter. In the following examples, you will find several messages that may be communicated in your newsletter articles, opinion editorials, or the "ask" in a direct request to a potential or current donor.

Letter 1: Bequests

Today's Date

Potential Donor's Name
Donor's Street Address
City, State and Zip Code

"What counts in life is not the mere fact that we have lived. It is what difference we have made to the lives of others that will determine the significance of the life we lead." — Nelson Mandela

Dear Donor:

In the end we are all remembered for our acts—for the lives we touch and by the causes we advance. In that light, I invite you to consider creating a lasting legacy by including the [your organization] endowment fund in your long-term plans.

The word "endowment" simply means that your legacy gift will be managed by the Community Foundation of Northern Colorado and invested for the benefit of [your organization]. The earnings from these investments will be contributed to [your organization] every year and then used by [your organization] to fulfill its mission.

You may create an endowment fund in your name or the name of another. Then each year a gift in the fund's name will be distributed to [your organization]. Legacy gifts take many forms including:

- Gifts made in your will or trust;
- Gifts that pay you income;
- Gifts of life insurance or retirement plan assets.

To learn more, please return the enclosed confidential response card or contact [your organization's contact person and contact info]. You may contact the Community Foundation of Northern Colorado at (970) 224-3462 or grants@NoCoFoundation.org.

Sincerely,

Name
Title

Enclosure



Letter 2: Why an endowment fund?

Today's Date

Potential Donor's Name
Donor's Street Address
City, State and Zip Code

"The great use of life is to spend it for something that outlasts it." — William James

Dear Donor:

The future is hard to predict. But one thing we do know is that we will need resources to fuel our mission in years to come. That's why we've established the [your organization] endowment fund at the Community Foundation of Northern Colorado. The fund is professionally invested for the long-term. Each year, 4.5% of the average fund balance is distributed to us to support our ongoing needs.

That's why our endowment fund is at the Community Foundation. Our endowment fund benefits from the Foundation's investment expertise and from being part of a large portfolio. The Foundation also handles all administrative details and investment responsibilities for our fund, freeing our staff to concentrate on our mission.

You can play a part. There are a variety of ways to give that provide you with maximum tax and financial benefits. They include:

- A gift made in your will or trust;
- A gift that pays you income for life;
- A gift of life insurance or retirement plan assets.

We hope you will play a part in our future. To learn more, please return the enclosed confidential response card or contact [your organization's contact person and contact info]. You may contact the Community Foundation of Northern Colorado at (970) 224-3462 or grants@NoCoFoundation.org.

Sincerely,

Name
Title

Enclosure



Response Card

It's important to include a response card with your solicitation letter, encouraging donors to "invite" you to contact them. Here's a simple message to include.

- Please send me additional information about:
 - Creating a fund in my name for [your organization].
 - Making a gift that provides income during my lifetime.
- I have included [your organization] in my long-term plans.

Name: _____ Address: _____

Phone: _____ Email: _____

Your response will remain confidential.

Since 1975, the Community Foundation of Northern Colorado has been connecting people who care to the causes they care about. The Foundation serves as the long-term steward for charitable funds — a multifaceted role that involves receiving and managing complex gifts, acting as the trustee of charitable trusts, providing numerous investment options for donors, and accounting for each individual fund.



Endowment Building Articles

You can build awareness about building your organization's endowment a number of ways. Whether you choose to run an article in your organization's newsletter or place an opinion editorial article in a local newspaper, you'll find the Community Foundation of Northern Colorado's endowment building articles a good place to start. Think about creative ways you can use these articles to help educate those who are close to your organization—donors, members and volunteers—about the importance of planning for your long-term future.

Article 1: Bequests

"What counts in life is not the mere fact that we have lived. It is what difference we have made to the lives of others that will determine the significance of the life we lead." — Nelson Mandela

In the end we are all remembered for our acts—for the lives we touch and by the causes we advance. In that respect, perhaps the most important thing that you could do to create a lasting legacy in our community would be to include the following provision in your Last Will and Testament:

"I give and bequeath the sum of \$_____ [or state a percentage of the residual estate] to the [your organization] endowment fund at the Community Foundation of Northern Colorado, a Colorado nonprofit and section 501(c)(3) tax exempt organization."

This simple language is all it takes to create a perpetual gift that will help to carry on [your organization]'s mission forever. The word "endowment" means simply that the gift initially contributed will be held by the CFNC and invested for the benefit of [your organization]. The earnings from these investments will be contributed to [your organization] every year and then used by [your organization] to fulfill its mission.

Although endowments can be created anonymously, endowments also can bear the name of their creator. This practice both memorializes those who made the gifts from the endowment possible and inspires others to do the same.

To learn more about making a charitable bequest for [your organization], please contact [your organization's contact person and contact info]. You may contact the Community Foundation of Northern Colorado at (970) 224-3462 or grants@NoCoFoundation.org.



Article 2: Why an Endowment Fund?

"The great use of life is to spend it for something that outlasts it." — William James

The future is hard to predict. But one thing we do know is that we will need resources to fuel our mission in years to come. That's why we've established the [your organization] endowment fund at the Community Foundation of Northern Colorado. The fund is professionally invested for the long-term. Each year, 4.5% of the average fund balance is distributed to us to support our ongoing needs. That's why our endowment fund is at the Community Foundation.

Our endowment fund benefits from the Foundation's investment expertise and from being part of a large portfolio. The Foundation also handles all administrative details and investment responsibilities for our fund, freeing our staff to concentrate on our mission.

You can play a part. There are a variety of ways to give that provide you with maximum tax and financial benefits. They include:

- A gift made in your will or trust;
- A gift that pays you income for life;
- A gift of life insurance or retirement plan assets.

We hope you will play a part in our future. To learn more, please contact [your organization's contact person and contact info]. You may contact the Community Foundation of Northern Colorado at (970) 224-3462 or grants@NoCoFoundation.org.

Please note: This information should not be considered as legal, tax, or financial advice. Consult your professional advisor(s) for further information and guidance.



Article 3: The Charitable Gift Annuity Advantage

Would you like more tax-free income? Would you like to support our mission? A gift annuity may be the best way to achieve both objectives—you will earn more tax-free income and benefit our cause far into the future. Consider a charitable gift annuity with the Community Foundation of Northern Colorado that will ultimately benefit [your organization]'s endowment fund.

A gift annuity gives you a fixed annual income payment for life at a very attractive rate of return. This rate, which rises with age, is based on your age at the time you make the gift. A gift annuity is a simple and powerful tool for charitable giving, particularly in a low-interest rate environment. Some key advantages include:

- Guaranteed life-income for the annuitant, much of it tax-free;
- Immediate tax savings through a charitable deduction;
- The gift is not included in your gross estate for estate tax purposes.

A gift annuity is easy to establish. All you have to do is decide on the gift amount and work out a few details with [your organization] or the Community Foundation, sign a one-page agreement with the Foundation, and make your gift with a check or stock transfer. Payments to you will be made quarterly or annually, according to your wishes. [Your organization]'s endowment fund will receive the remainder after your lifetime.

If you have any questions or would like to receive a custom illustration of the payments your gift annuity would generate, please contact [your organization's contact person and contact info]. You may contact the Community Foundation of Northern Colorado at (970) 224-3462 or grants@NoCoFoundation.org.

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Article 4: Beneficiary Designations

"If you can't feed a hundred people, then feed just one." — Mother Teresa

You can make a great difference to our mission and our future just the way you are...whether or not you have all your estate planning documents up-to-date. Every gift matters and you can leave a legacy gift to our endowment fund during your lifetime.

The following are three ways you can make this important gift to our endowment fund:

- Life Insurance beneficiary designation;
- Retirement plan beneficiary designation;
- Fixed or variable annuity beneficiary designation.

After obtaining the appropriate beneficiary designation form, you can make a gift that takes effect upon your death. The gift may be the entire account or a percentage of it. You may also make it effective only if certain other beneficiaries predecease you. By making the gift payable to "the [your organization] Endowment Fund at the Community Foundation of Northern Colorado, a Colorado nonprofit corporation", you can be assured that your gift will receive expert stewardship and help [your organization] meet our long-term needs. Of course, while these beneficiary designation gifts do not require that you make changes to your will and trust documents, they should be considered in light of your overall financial and estate plan.

To learn more about making a legacy gift to [your organization]'s endowment fund, please contact [your organization's contact person and contact info]. You may contact the Community Foundation of Northern Colorado at (970) 224-3462 or grants@NoCoFoundation.org.

Please note: This information should not be considered as legal, tax, or financial advice. Consult your professional advisor(s) for further information and guidance.

Since 1975, the Community Foundation of Northern Colorado has been connecting people who care to the causes they care about. The Foundation serves as the long-term steward for charitable funds — a multifaceted role that involves receiving and managing complex gifts, acting as the trustee of charitable trusts, providing numerous investment options for donors, and accounting for each individual fund.



COMMUNITY FOUNDATION
OF NORTHERN COLORADO

We're planning for our future by building our endowment fund at the Community Foundation of Northern Colorado.

Will **YOU**
Play a Part?

www.NoCoFoundation.org





COMMUNITY FOUNDATION

OF NORTHERN COLORADO

4745 Wheaton Dr.,
Fort Collins CO 80525

The [your name] Fund at the Community Foundation of Northern Colorado will provide us with essential annual support now and for years to come. There are many ways you can give now and in the future. You can even make a gift in your will that costs you nothing during your lifetime.

To learn how you can play a part in our long-term future, please contact [your organization's contact person and contact info]. You may contact the Community Foundation of Northern Colorado at (970) 224-3462 or grants@nocofoundation.org.



We're planning for our future by building our endowment fund at the Community Foundation of Northern Colorado.

Will **YOU** Play a Part?



The [your name] Fund at the Community Foundation of Northern Colorado will provide us with essential annual support now and for years to come. There are many ways you can give now and in the future. You can even make a gift in your will that costs you nothing during your lifetime.

To learn how you can play a part in our long-term future, please contact [your organization's contact person and contact info]. You may contact the Community Foundation of Northern Colorado at (970) 224-3462 or grants@NoCoFoundation.org.



Leave Your Legacy with a Charitable Fund at the Community Foundation of Northern Colorado

You've thoughtfully determined that you want to enrich our organization with a fund at the Community Foundation of Northern Colorado. Now, you can find the best way to achieve your goal by considering how and when to make your gift. Here are a few options. We encourage you to talk with us to share your ideas and learn more.

Gifts made through your will or trust

A simple provision in your will or trust can provide for our organization after your lifetime. Flexible and revocable, a bequest allows you to make a gift that costs you nothing during your lifetime. You can give a specific amount or a percentage of your estate. Consider a bequest to endow your lifetime giving, so that after you pass away our organization will receive annual gifts in your name from a fund at the Community Foundation.

Gifts of retirement plan assets

An Individual Retirement Account (IRA) or other qualified retirement plan offers a strategic giving option. At your direction, the balance in the account can be distributed directly to a Community Foundation charitable fund after your lifetime. It goes to work, providing annual support for our organization in your name.

Gifts of life insurance

For many people, life insurance affords a practical means of making a significant gift. You may name our organization's endowment fund at the Community Foundation as beneficiary of a new or paid-up life insurance policy. If you make the Foundation the owner of the policy as well as beneficiary, you may receive current income tax benefits.

Gifts that pay you income for life

A charitable gift annuity or a charitable remainder trust can provide you with lifetime income and establish a charitable fund in the future with remaining assets. This gift provides a current income tax charitable deduction as well as potential estate tax savings. Best of all, you ensure long-term support for our organization.

Gifts through a charitable lead trust

Some donors donate the income from an asset to our fund at the Foundation for a period of years, without contributing the income-producing asset itself. This is done with a charitable lead trust, which allows the Foundation to receive the income of the asset and can provide you with substantial tax benefits.

Gifts of real estate

Real estate offers many tax-wise giving opportunities. You may be in a position to transfer your personal residence, vacation home, or farm to a fund for our organization at the Community Foundation and reserve the right to use the property for your lifetime. With this plan, you receive a current income tax charitable deduction for the remainder value of the property, which depends on your age and the property's appraised value.



Additional options for giving

Current and deferred gifts may be tailored to suit your needs using various assets including:

- Gifts of cash;
- Gifts of publicly traded securities;
- Gifts of closely-held stock;
- Gifts of tangible property.

Please note: This information should not be considered as legal, tax, or financial advice. Consult your professional advisor(s) for further information and guidance.

To learn more about the Community Foundation of Northern Colorado's role, please contact our Community Engagement Team at (970) 224-3462 or grants@nocofoundation.org.

Since 1975, the Community Foundation of Northern Colorado has been connecting people who care to the causes they care about. The Foundation serves as the long-term steward for charitable funds — a multifaceted role that involves receiving and managing complex gifts, acting as the trustee of charitable trusts, providing numerous investment options for donors, and accounting for each individual fund.



Sample Messages to Encourage Endowment and Legacy Gifts

One Line Messages

A simple message can be used as a consistent reminder to your donors. Place the message on letterhead, on envelopes, in your newsletter, and on your website.

- Remember, you can provide for [your organization]'s future with a gift in your will.
- Please remember [your organization] when making your long-term financial plans.
- Have you considered including [your organization] in your long-term financial plans?

Messages that Invite a Response

With these messages, you offer your donors a chance to request additional information about endowment and legacy giving. Include one of these messages—or combine two or more—on gift envelopes and reply cards, as well as in newsletters. If requested, the Community Foundation will help customize the information needed to respond to these requests.

___ Please send me additional information about:

___ Creating a fund in my name for [your organization].

___ Making a gift that provides income during my lifetime.

___ I have included [your organization] in my long-term plans.

Name: _____ Address: _____

Phone: _____ Email: _____

Your response will remain confidential.

___ I have included [your organization]'s endowment fund in my long-term plans.

___ Please send me information about including [your organization] in my estate plans.

Name: _____ Address: _____

Phone: _____ Email: _____

Your response will remain confidential.

Please send me additional information regarding:

___ Making a gift in my will for the benefit of [your organization]'s endowment fund.

___ Making a gift that provides income for my lifetime.

___ Benefits of donating non-cash assets.

Name: _____ Address: _____

Phone: _____ Email: _____

Your response will remain confidential.

To learn more about making a bequest to [your organization]'s Endowment Fund, please contact [your organization's] contact person and contact info]. You may contact our Community Engagement Team at (970) 224-3462 or grants@nocofoundation.org.

Since 1975, the Community Foundation of Northern Colorado has been connecting people who care to the causes they care about. The Foundation serves as the long-term steward for charitable funds — a multifaceted role that involves receiving and managing complex gifts, acting as the trustee of charitable trusts, providing numerous investment options for donors, and accounting for each individual fund.



Sample Language for Charitable Gifts in Wills

If you would like to help build the long-term financial strength of [your organization] through our endowment fund with the Community Foundation of Northern Colorado, but feel as though you cannot make a significant gift today, your solution may be a charitable bequest. A bequest under your will can complement your lifestyle and commitments today while supporting our fund at the Community Foundation later. Here are several ways you can write a bequest into your will.

If you wish to make a gift to the [your organization] Endowment Fund at the Foundation:

“I give the sum of \$ _____ [or state a percentage of the residual estate] to the [your organization] Endowment Fund at the Community Foundation of Northern Colorado, a Colorado nonprofit and 501(c)(3) tax exempt organization. The Community Foundation's EIN is 84-0699243.”

If you wish to create a named fund at the Community Foundation to benefit [your organization] (Named funds are created with a gift of at least \$10,000):

“I give the sum of \$ _____ [or state a percentage of the residual estate] to the [your organization] Endowment Fund at the Community Foundation of Northern Colorado, a Colorado nonprofit and section 501(c)(3) tax exempt organization, to be administered as a separate fund in accordance with and subject to the governing instruments of the Foundation, the income there from to annually benefit [your organization]. The Community Foundation's EIN is 84-0699243. It is my desire that the Fund established with this bequest be named the _____ Fund, and shall be recognized as such in all correspondence, reports and materials related to the Fund.”

To learn more about making a bequest to [your organization]'s endowment fund, please contact [your organization's contact person and contact info]. You may contact our Community Engagement Team at (970) 224-3462 or grants@nocofoundation.org.

Please note: This information should not be considered as legal, tax, or financial advice. Consult your professional advisor(s) for further information and guidance.

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