LEAVE A LEGACY

Give to the future. You’ve lived here. You’ve worked here. You are part of this community’s past and present. By creating an endowment fund with the Oshkosh Area Community Foundation, you can invest in this community’s future.

HOW IT WORKS

• Choose to endow your gift of $10,000 or more to the community foundation – ask us about options for making gifts over time that add up to the minimum amount.
• The principal of your fund is never spent, and it can grow over time to generate an increasing stream of funding devoted to your interest areas and this community.
• Earnings are used to make grants that meet community needs. Your gift – and all future income from your gift – is a permanent source of community funding that makes good work possible, forever.

YOUR LEGACY OF GIVING

A bequest is often the simplest way for many donors to make a significant, lasting gift to their community. By naming the Foundation in your will or estate plan, you can create a named fund that will forever support the causes or organizations important to you. A bequest of 1 percent to 10 percent of your estate can dramatically reduce federal estate and inheritance taxes, with little or no impact on your heirs.

A NONPROFIT’S SOURCE OF STABILITY

Leaders of a nonprofit organization may also look to the community foundation to hold their organization’s endowment because they know that having a constant source of funding helps them respond to emergency needs as well as plan for the future and sustain the good work they do.
TOGETHER FOR GREATER ADVANTAGE

Gifts endowed by the Community Foundation are pooled with others to achieve maximum investment efficiency and return. They grow and benefit the community with guidance from experienced local leaders and expert investment managers.

HOW YOUR ENDOWMENT GROWS

<table>
<thead>
<tr>
<th>Year 1</th>
<th>Year 25</th>
<th>Year 50</th>
</tr>
</thead>
<tbody>
<tr>
<td>You establish a Family Fund</td>
<td>$186,000 in cumulative grants and services</td>
<td>$541,000 in cumulative grants and services</td>
</tr>
<tr>
<td>$100,000 gift</td>
<td>$190,000 balance</td>
<td>$360,000 balance</td>
</tr>
</tbody>
</table>

Initial gift has grown and paid out:

4 Times

9 Times

Assumes 5% annual payout and 8% rate of return

An endowment can be compared to a savings account or a retirement savings plan. People make donations to an endowment and the funds are invested with growth as a goal. From the income, grants are made and the principal of the gift always remains intact.

The Foundation works with dozens of local nonprofits to grow endowment funds to support their missions now, and for the future. For these organizations, an endowment establishes their permanency in the community.

• An endowment gift allows you to make a permanent contribution to the community’s future. You can ensure the success of an organization for generations.
• An endowment gift ensures that an organization will have resources to withstand economic ups and downs or unexpected events that might put its existence into jeopardy.
• An endowment gift can be directed to a specific organization, sector or can be unrestricted. Fewer restrictions on gifts allow the Foundation and organizations the latitude to address needs that emerge in the future.
• An endowment gift allows you to perpetuate your annual contributions to causes you care about right now.

For more information on leaving your legacy, visit OshkoshAreaCF.org

230 Ohio St., Suite 100 • Oshkosh, WI 54902 • 920.426.3993 • www.OshkoshAreaCF.org