

Donor Named Fund

YOUR GIFT WILL
KEEP ON GIVING
IN PERPETUITY.



The role of the Donor is to establish a sub-fund within the Foundation's General Fund or within a Specific Fund using a contribution of cash, securities or marketable property valued at \$10,000 or more, name your fund, add to your fund at any time, take an income tax deduction each time a gift is made to your fund, take an estate tax deduction if or when you add to your fund at death and invite others to add to your fund as often as they can.

The role of the Foundation is to research school needs and direct the funds to meet those needs, investigate and approve grant requests, monitor and evaluate outcomes of approved grants, administer the fund and manage its investments. The trustees also report on the fund in its annual report and press releases about grants unless the donor requests anonymity, assure that the name of the fund is associated with all grants made from the earnings of the fund in perpetuity.

The Donor and a representative of the Foundation both sign the transmittal document which indicates the initial contribution, name of the fund, type of fund and whether the fund is part of the General Fund or a Specific Fund. The transmittal document also indicates the responsibilities of the Foundation.

Donor Advised Fund



The role of the Donor is to establish an Advised Fund within a Specific Fund within the Foundation with a contribution of cash, securities or other marketable property valued at \$50,000 or more. Name your fund, add to your fund at any time, take a tax deduction each time a gift is made to your fund, make annual suggestions about distribution from the income of your fund in perpetuity to St. Peter's Schools and invite others to add to your fund as often as they can.

The role of the Foundation is to work with you or your representative, to help decide where, in St. Peter's Schools, the annual distributions from the Donor Advised Fund will be placed, share research on school needs, review and approve distribution requests, process grants and provide notification to you, monitor and evaluate outcomes of approved distributions, administer the fund and manage its investments. The trustees also report on the fund in its annual report and press releases on grants unless you request anonymity. They also assure the name of the fund is associated with all grants made from the earnings of the fund in perpetuity.

The Donor and a representative of the Foundation both sign the transmittal document which indicates the initial contribution, name of the fund, type of fund and the direction/purpose of the fund. The transmittal document also indicates the responsibilities of the Foundation.



Donor Specific Fund

The role of the Donor is to establish a fund with a contribution of cash, securities, or other marketable properties valued at \$100,000 or more, name the fund, indicate the area of interest to be supported, add to the fund at any time, take a tax deduction each time a gift is made to the fund, make periodic suggestions regarding distributions from the fund to St. Peter's Schools and invite others to add to your fund as often as they can.

The role of the Foundation is to assure that the annual distributions from the Specific Fund carry out the stated purpose of the fund, assure that the name of the donor or fund is associated with all distributions from the fund, administer the fund and manage its investments. The trustees also report on the fund in its annual report and media releases regarding grants unless the Donor has requested anonymity.

The Donor and a representative of the Foundation both sign the transmittal document which indicates the initial contribution, name of the fund, type of fund and the direction/purpose of the fund. The transmittal document also indicates the responsibilities of the Foundation.

How to establish a fund