

Benefits to Donors from supporting the Foundation

YOUR GIFT WILL KEEP ON
GIVING IN PERPETUITY. WHEN
THE FOUNDATION RECEIVES
YOUR CONTRIBUTION, IT WILL
IMMEDIATELY INVEST IT AND
MAKE ANNUAL DISTRIBUTIONS
FROM THE EARNINGS TO
ST. PETER'S SCHOOLS IN
PERPETUITY.



The Trustees of the Foundation will make distributions at their discretion if you have given to the General Fund, or for the specific purpose if you have given to a Specific Fund. In either case, complete confidence is respected with all of our donors and their financial and legal advisors.

All contributions are professionally managed. All investing is done using specialized professional money managers. Contributions to the Foundation are pooled for investment purposes and are invested in accordance with sound investment policies, procedures and guidelines established by the Board of Trustees of the Foundation. Because individual funds of the Foundation are pooled for investment purposes, a diverse portfolio mix is obtained and investment fees are minimized. The Investment Committee of the Foundation regularly reviews the performance of its investment managers.

Your gift will meet changing needs at the schools. Many donors do not place restrictions or directives on how the annual distribution from their fund is to be used, leaving the annual distribution decisions to the Foundation's Distribution Committee. Others choose to place certain restrictions or directives on their funds. If the intended purpose of your gift becomes obsolete in the future, the Foundation's authority to amend provisions of your distribution directives will insure that the fund will continue under its designated name to meet the changing needs of St. Peter's Schools in perpetuity.

The Foundation is publicly accountable. Annual reporting of financial condition including an independent accounting report by a certified public accountant, the filing of Federal 990 tax returns, as well as public disclosure of all distribution activities, along with a broad based Board of Trustees representing diverse expertise, assures the continued use of the Foundation's funds in the best interest of St. Peter's Schools.

- *Assures maximum income tax deductions:* possibly as much as 50% of adjusted gross income for gifts of cash and as much as 30% of adjusted gross income for gifts of appreciated property.
- *Assures maximum estate tax deductions:* possibly as much as 60% of charitable gifts to the Foundation will be saved in state and federal estate taxes.

- *Assures charitable intent:* guarantees you and your family that your gift to the Foundation will benefit St. Peter's Schools in perpetuity in a way that enhances your specific charitable intent.

Other Benefits:

There are many ways to

support the foundation



Gifts of Cash - The simplest way to donate to the Dunn Foundation is a gift of cash providing immediate support for its many programs and providing an immediate tax deduction for you.

Gifts of Real Estate - Anytime is good to consider a gift of real estate. Say, for instance, you donate real estate worth \$100,000, purchased for \$60,000. The Foundation receives a gift of \$100,000 and you receive a deduction for the same amount while avoiding capital gains tax on the \$40,000 appreciation. What's more, it's possible to retain the use of the real estate for the remainder of your lifetime.

Gifts of Stock - Years-end might be a good time to consider a gift of appreciated stock. The stock can be publically traded or closely held. For example, if you donate stock worth \$20,000, purchased for \$10,000, the Foundation receives a gift of \$20,000 and you receive a deduction for the same amount while avoiding capital gains tax on the \$10,000 appreciation.

Gifts of Income - If you have investments that provide income you do not need for several years, you can gift that income to the Foundation and take a deduction in one year for all the income to be given in future years.

Gifts of Life Insurance - You may have a life insurance policy that you no longer need for estate planning purposes. You can gift that policy to the Foundation and take a deduction for the cash value.