

How To Start An Endowment

Foundation X partners with you to further your impact and bring your vision and mission to life. One of the most impactful ways we help organizations is through sophisticated investment plans, designed so you can invest in your mission and what truly matters: others.

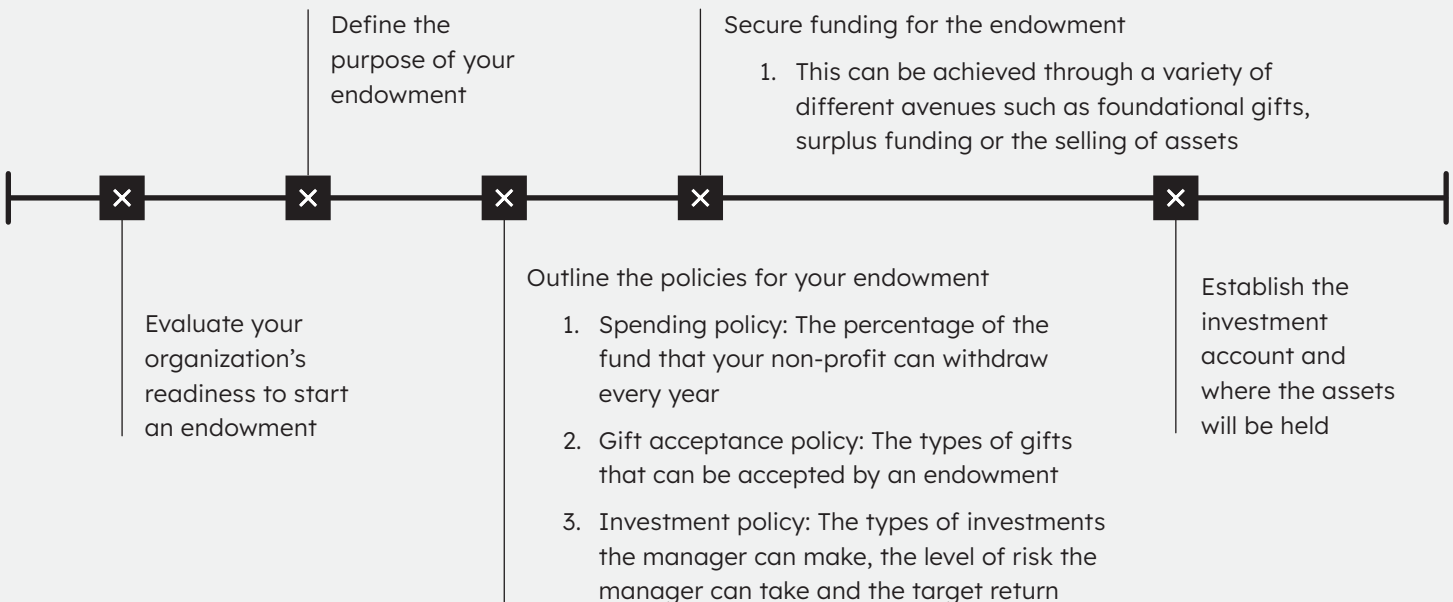
BENEFITS OF AN ENDOWMENT

An ideal option for long-term stability, endowments offer nonprofits various benefits to achieve their financial goals and further their impact, including:

- A stable and reliable source of income
- Enhanced trust with donors, clients and staff
- Increased giving options for donors

STARTING AN ENDOWMENT

Establishing the policies that your endowment will be governed around, and the continuous management of an endowment, can come with its own set of unique set of challenges. To simplify the process, the following outlines the steps and considerations when starting an Endowment.



MANAGING AN ENDOWMENT

Ongoing maintenance and management is required for a fund on an annual basis. At a minimum, you should:

- Consistently review the allocation of assets to maximize returns
- Determine annually what to do with surplus earnings and principal, including reinvesting funds or increasing operational budget

"The tax and foundation planning information offered is general in nature. It is provided for informational purposes only and should not be construed as tax or legal advice. You are encouraged to consult an attorney or tax professional regarding your specific tax and legal situation."