



HOW TO GIVE TO AN ENDOWMENT

What is an Endowment?

An endowment is a permanent fund invested to produce income for a specific purpose. The principal remains perpetually untouched; only the earnings generated are granted annually. Since endowments are maintained forever, a gift to an endowment provides for future generations; imagine knowing that because of your decision today, a grant will be made every year, even beyond 100 years from now!

Give Now

There are many ways to make a gift directly to an endowment today.

- **A check** made out to “The Catholic Community Foundation of Santa Clara County” with the endowment name in the memo line.
 - Please mail your checks to 777 North First Street, Suite 490, San Jose, CA 95112
- **A stock transfer** using our Stock Transfer Form.
 - Give your broker this form: www.cfoscc.org/wp-content/themes/Catholic/pdf/Forms_StockTransfer.pdf
- **An online donation** using your credit card.
 - Our online donation form can be found at <https://giving.cfoscc.org/DonateNow>
- **An IRA Required Minimum Distribution (RMD)** directed to an endowment - for donors 70 ½ years or older.

Give Later

Remembering an endowment in your will is a beautiful way to leave a legacy for an organization or ministry you love.

- **A Charitable Bequest** in your estate plan for a specific amount, a specific property, or for a percentage of it.
 - See bequest language to give to your attorney here: <http://cfoscclegacy.org/bequest-language>
- **A Retirement Plan:** Designate one of our endowments with CCF as beneficiary of all or part of it.
 - Let your IRA manager know that you would like to change/add beneficiaries.
- **An Insurance Policy:** Designate one of our endowments with CCF as beneficiary of all or part of it.
 - Ask your insurance company for a beneficiary designation form.

You can also make a **gift of real estate** now or later. Please contact the Foundation for more information.

777 North First Street, Suite 490, San Jose, CA 95112 | 408.995.5219 | 408.995.5865 fax | info@cfoscc.org | www.cfoscc.org

This gift is for the _____ fund.
(Beneficiary Organization)

Donor Name _____ Date of Birth _____

Donor Name _____ Date of Birth _____

Address _____ Installment Amount \$ _____

City, State, Zip _____ Frequency of Gift(s):
 One Time Monthly Quarterly Annually

Email _____ Total Gift Amount \$ _____

Phone _____ Is this Anonymous to the beneficiary? Y N

Payment Options: Please make checks payable to “The Catholic Community Foundation of Santa Clara County”

Or, Credit Card Number _____ Expiration Date _____

Or, for ACH transfers, please include a voided check with your account and routing information.