



Your Donors Can Endow Their Annual Gift

If you're fortunate, you have many loyal donors who contribute year after year. Many donors make modest annual gifts. However, when their gift is added together with your other annual donors' their combined support represents an important part of your annual budget.

Unfortunately, when an annual donor dies their annual support dies with them.

Consider speaking with your most loyal annual donors about endowing their gift! By including a bequest¹ under their will or designating your organization as a beneficiary of a retirement account, life insurance policy, or annuity contract they can endow their annual gift.

For example, a donor who makes a \$100 annual gift might consider a bequest of \$2,500. ($\$100 \times 25 = \$2,500$). It will cost them nothing today and will allow you to withdraw \$100 per year in perpetuity ($\$2,500 \times 4\% \text{ spending policy} = \100). Your donor's legacy could be a recurring gift, in their name, that reflects their generosity, and will support your good work in perpetuity.

Continue Their Annual Support With a Bequest

Current Annual Gift Amount	Bequest Amount to Endow Your Annual Gift (Your Annual Spending Policy %)		
	3%	4%	5%
\$25	\$833	\$625	\$500
\$50	\$1,667	\$1,250	\$1,000
\$100	\$3,333	\$2,500	\$2,000
\$250	\$8,333	\$6,250	\$5,000
\$500	\$16,667	\$12,500	\$10,000
\$1,000	\$33,333	\$25,000	\$20,000
\$2,500	\$83,333	\$62,500	\$50,000
\$5,000	\$166,667	\$125,000	\$100,000
\$10,000	\$333,333	\$250,000	\$200,000

¹ We define "bequest" as any gift made at the time of a donor's death. This includes gifts under a donor's will or trust *and* includes beneficiary designations on retirement accounts, annuity contracts or life insurance policies. Feel free to contact us if you'd like to discuss ways to establish or refresh your planned giving efforts.