

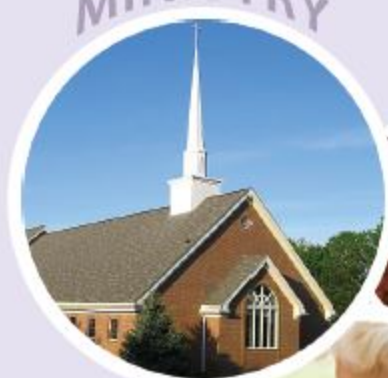
**FOR  
YOUR  
LIFETIME  
AND BEYOND**



FOR INDIVIDUALS AND FAMILIES

Connecting People Who Care  
to Ministries That Matter

MINISTRY



FAMILY



MISSION



SCHOLARSHIPS

## Friends in Christ,

Many Christian individuals and families desire to remember their favorite ministries and charitable organizations through their current giving and estate plans. One way to accomplish this goal is to establish a legacy, or memorial, endowment bearing the family name or that of a particular family member or friend.

### *Why establish a legacy endowment?*

One of the key reasons individuals or families create legacy endowments is to ensure that the security of their values are held in perpetuity. By establishing a legacy endowment with American Baptist Foundation (ABF), an individual or a family can be certain that the American Baptist ministries and missions they hold dear are supported for years to come.

*"We are not rich; can we afford to establish such a fund?" or "Doing something like this is too complicated for me."*

While these may be legitimate concerns, ABF has the resources and tools to make the process straightforward and cost effective. An endowment can grow over time. Planting a seed may encourage other family members and friends to add to the fund over time. God has blessed each of us and we have an opportunity to make a difference.

*Consider if an individual or family endowment is the next step in securing your or your family's legacy.*

Generosity and foresight can be achieved with a legacy endowment. They create a chance to communicate your lifetime commitment to ABC ministry and mission while providing a living witness that can ensure the continuance of ministry for generations to come.

With Blessings,

*Perkin Simpson*

Rev. Perkin Simpson, MBA, CAP®  
Executive Director

## What is an Endowment?

Endowments are permanent funds established by a Donor to support a specified purpose(s). A donor may be an individual or family. Only the income from the fund is distributed as directed by the donor. The principal remains intact and is invested for long-term growth.

Not only can endowments provide funds for ministry and mission, they can also serve as effective tools to attract additional support from those interested in the specific purpose(s). In fact, endowments have been used to fund many ministry and mission purposes, including:

- Local, Regional & National Ministry Projects
- Scholarships
- Youth Camping Ministries
- Missionary Support
- Building & Maintenance

## How does an endowment work?

1a. Donor establishes a Legacy Endowment\*



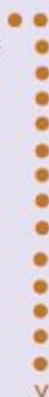
Donor(s)

1b. Missions & Ministries may contribute additional gifts to the endowment.



Mission & Ministry

2. Donor receives Tax and Personal benefits.



3. Ministry receives income support.



\* Individuals may also donate to the Legacy Endowment after it is established.

## ***Your Endowment Fund***

Once you establish an endowment with American Baptist Foundation, you may choose to initially fund it with a single donation of cash, securities, real estate or other property or through gifts made over time.

In this light, some donors have created an endowment with a gift during their lifetime or on a testamentary basis through a will, life insurance, retirement plan or other portion of their estate. You or your family may also choose to establish an endowment with a bequest of the remainder of a life-income gift such as a charitable trust or charitable gift annuity.

- ***What would your endowment support?***
- ***What would you call it?***
- ***What impact do you desire the endowment to have over time?***
- ***Will there be other contributors?***
- ***What if your original purpose no longer exists?***

These are important questions to consider and ABF is willing and able to assist. ABF also provides a variety of resources to assist you or your family with promoting your endowment fund. With your input, ABF can provide customized communications to build awareness around the mission and purpose of the fund.

Endowments can be established to support most American Baptist ministry and mission objectives. Whether you desire to fund your local church or region, *International Ministries AB Home Mission Societies*, or another American Baptist partner -- an endowment should be one of the options explored.

*American Baptist Foundation encourages gifts to support our contributing partners:*



## ***Managing Your Endowment***

American Baptist Foundation (ABF) manages a variety of endowment funds in accordance with our investment policies. All assets are pooled and professionally managed with objectives designed to:

- **Preserve principal**
- **Invest in long-term growth of principal**
- **Produce a steady stream of income to support ministries**

### ***Will your investment be safe and protected?***

ABF's Investment Sub-Committee, under the oversight of the ABF Board Finance Committee, directs a balanced portfolio that uses Socially Responsible Investments through a mix of stocks, bonds and other financial instruments. Adhering to the Prudent Investor standard, investment managers are regularly monitored to ensure that they meet appropriate benchmark and investment objective standards.

Additional details on ABF's investment policies are available by contacting the Foundation office at 1-610-768-2035 or visiting our website [www.abcofgiving.com](http://www.abcofgiving.com)

*The minimum investment required to establish an endowment with ABF is \$10,000. Donors who seek to plant a smaller seed now and contribute to the fund in the future may do so.*

### ***Privacy***

The American Baptist Foundation respects your wishes for privacy and will not share, sell, or exchange your personal information to anyone not acting on behalf of the Foundation. Safeguards have been put in place to protect data.

### ***General Information***

If you or your family have found this information helpful, and are considering setting up an individual or family endowment, please do not hesitate to reach out to the ABF team at 1-610-768-2035 or [abfadmin@abc-usa.org](mailto:abfadmin@abc-usa.org).

We look forward to hearing from you and in continuing our mission of ***Connecting People Who Care to Ministries that Matter!***

COMMUNITY



YOUTH CAMP



LEADERSHIP

# LEGACY ENDOWMENTS

# LEGACY ENDDOWMENTS

## FOR INDIVIDUALS AND FAMILIES



I would like more information about establishing  
a Legacy Endowment

Simply complete & mail the form below.

NAME \_\_\_\_\_  
STREET \_\_\_\_\_  
\_\_\_\_\_  
CITY \_\_\_\_\_  
STATE \_\_\_\_\_ ZIP \_\_\_\_\_  
PHONE \_\_\_\_\_  
EMAIL \_\_\_\_\_

(Fold in half, this side facing in, then tape shut)

I would also like to know more about:

- Making a will that works for me, my loved ones, and ABC ministry & mission.
- How to reduce estate, capital gains and income taxes.
- How to increase and at the same time, support my church or other American Baptist ministries/missions.
- How to establish a planned giving program in my church.
- Other: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



**For more information about Family Endowments  
please contact:**

American Baptist Foundation  
P.O. Box 851  
Valley Forge, PA 19482

P: 610.768.2035  
E: [abfadmin@abc-usa.org](mailto:abfadmin@abc-usa.org)

Or visit us online at:  
[www.abcofgiving.org](http://www.abcofgiving.org)

