

Sample Gift Agreement

We, the Smith Family, made a gift to the Christian Church Foundation. We hereby request the Foundation administer such gift as a permanent fund pursuant to the following provisions:

1. We request that the Foundation use such gift to establish a permanent fund to be known as the Smith Fund.
2. We request that the gift be retained as a permanent fund and request that annual distributions of Income, as defined in the Joint Investment Trust, be made after the Fund reaches \$10,000, as follows:
 - 50% to First Christian Church, Smithville, USA
 - 25% to Week of Compassion
 - 25% to Disciples Missions Fund

If First Christian Church should cease to exist or to be affiliated with the Christian Church (Disciples of Christ), then we request that their Income be distributed to help establish new congregations.

3. We or others, from time to time, may add to the Fund, such as through additional lifetime contributions, the remainder of life income gifts, and/or bequests.

4. We, from time to time, may recommend the annual payment from the Fund be distributed to organizations other than those designated in Paragraph 2, provided such institutions are affiliated with the Christian Church (Disciples of Christ).

5. We acknowledge the Board of Directors of the Christian Church Foundation shall have final authority over the management of the gift assets and the distributions from the Fund.

The Christian Church Foundation helps Disciples make a difference forever and discover the joy of serving Christ through the sharing of their resources.

Guide to a

Permanent Fund

The Gift That Keeps on Giving

Want more information?

Contact the Christian Church Foundation
(800) 668-8016
info@ccf.disciples.org



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Permanent Funds

Donors work with the Christian Church Foundation to steward their gifts to causes in the Christian Church (Disciples of Christ). When establishing permanent funds, donors designate causes to receive distributions in perpetuity. Donors name their charitable beneficiaries in a signed Permanent Fund Gift Agreement that is stewarded by the Christian Church Foundation.

Permanent funds provide a great deal of flexibility, enabling donors to support several causes with one fund. Donors, through their gift agreements, can also designate distributions to go to contingency beneficiaries should the beneficiary originally named no longer exist.

“Our lives have been so blessed by the people we have met and worked with — all because of our response to God’s call.

Our permanent fund is one way we can say ‘Thanks be to God’ and know our gift will continue to give.”

— Rev. James Allen and Jean Nichols



How to Establish a Permanent Fund

Creating a permanent fund with the Christian Church Foundation is a simple process:

EXECUTE A GIFT AGREEMENT FORM

In a meeting with a Foundation zone representative, donors discuss their wishes, choose a name for their fund, and decide on the charitable beneficiaries of their fund. This gift agreement can be modified during the donor’s lifetime and allows for the naming of contingent beneficiaries.

FUNDING THE GIFT

Several funding options exist for donors, including:

GIFTS OF CASH: A permanent fund can be started with a gift of cash. Contributions are tax-deductible.

GIFTS OF STOCKS, BONDS: Stocks, bonds, or other appreciated assets are a good way to start a permanent fund. In addition to the gift being tax-deductible, donors also can realize capital gain tax savings.

GIFTS FROM LIFE-INCOME PLANS: When making a planned gift through a charitable gift annuity or charitable remainder trust, it is possible to name your permanent fund with the Christian Church Foundation as the remainder beneficiary.

LEGACY GIFTS: Legacy gifts include beneficiary designations on retirement accounts or life insurance policies, pay-on-death designations on investment accounts, or gift provisions in the donor’s will or trust. Many options exist for making permanent fund gifts after the donor’s lifetime needs have been cared for. Talk to your Foundation zone representative to determine the best option for you.

Benefits of a Permanent Fund

FLEXIBILITY

Donors can provide ongoing support to numerous causes in the Church and to other beloved causes by consolidating their legacy gifts into one fund at the Foundation. Permanent funds may be established with a gift at death, or during the donor’s lifetime. Contact the Foundation to discuss which opportunities are best for you.

PROFESSIONAL FUND MANAGEMENT

The Christian Church Foundation manages permanent funds under the philosophy of protecting the inflation-adjusted value of a fund over time while providing for a growing stream of funding to the ministries designated by the donor. The Foundation utilizes a proactive investment discipline that has a long history of delivering adding value. Our combined size and our long relationship with our investment consultant, Prime Buchholz, LLC., offers management at very a competitive cost.

RECOGNITION

Each year, the Christian Church Foundation publishes an annual report that includes a list of established permanent funds with balances over \$1,000. A listing is also submitted each year to the Year Book and Directory of the Christian Church (Disciples of Christ). Donors who create a permanent fund with the Foundation are eligible to become members of the Fiers-Brown Society. A list of Fiers-Brown Society members is published on a regular basis.