

DONOR'S GUIDE

TO ESTABLISHING ENDOWMENTS

An endowment represents money that is donated to benefit the university and is meant to be invested to grow the principal to provide additional income for future use for charitable purposes. Creating an endowment allows a permanent resource to be established and named to make an impact now and for generations to come. This continuous source of revenue generated from the investment of your gift ensures perpetual benefits for the university and those it serves.

Minimum amount required to establish an endowment:

\$25,000

Time limit for reaching full endowment:

Up to 5 years

STEPS FOR ESTABLISHING AN ENDOWMENT:

1

Contact the Office of Development to inquire about arrangements that will best suit your financial and charitable goals, as well as address areas of need.

2

Set criteria for how the annual distributions from the endowment will be expended (scholarships, programs, capital, etc.).

Continued on opposite

3

Once the specifications have been determined, a draft gift agreement is prepared for review and execution. This agreement outlines how the funds will be used and managed by the UWG Foundation.

4

Each individual endowment is accounted for separately in a pooled fund, invested to provide maximum return.

5

Once the endowment is fully funded, it takes approximately one year before any distribution will be drawn to allow for earnings to grow.



4.25% of the endowed market value* will fund the annual scholarship allocation, professorship, or other purposes in the agreement. This is defined as the spendable rate. *Subject to the UWG Foundation Spending Policy.

1.25% funds the long-term health and sustainability of the Foundations' growth. This is defined as the annual administrative fee.



Only the 4.25% spendable rate for the annual allocation and 1.25% annual administrative rate are withdrawn from the endowment. Everything else remains in the endowment to grow as an investment for perpetuity. These rates are calculated using a 36-month trailing average market balance to provide sustainability for the investment.

GIFTS MAY BE MAILED TO THE FOLLOWING ADDRESS:

UWG Foundations
1601 Maple Street Carrollton, GA 30118

Please include the Fund name in the memo section of the check.

For additional information, please contact the Office of Development at 678-839-5035 or visit us at giving.westga.edu



FOUNDATION, INC.