



*to carry on the work of Christ by fostering philanthropy*

## INDIVIDUAL ENDOWMENT CONTRACT

**You have the privilege of naming your endowment fund.  
You may name your fund for yourself, family, parish, school or a specific charitable purpose.  
(e.g. Monsignor McMahon Endowment Fund; St. Mary Parish Endowment Fund; Organ  
Restoration Fund etc.)**

**Please name your fund**

As a donor you have full and equal rights to establish a designated fund or permanent endowment to provide for the support of charitable activities.

### Donor 1 Information

Mr.  Mrs.  Ms.  Dr.  Reverend  Sister  Other \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Bus Phone: \_\_\_\_\_

Fax: \_\_\_\_\_ Email: \_\_\_\_\_

### Donor 2 Information

Mr.  Mrs.  Ms.  Dr.  Other \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_

Organization: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Bus Phone: \_\_\_\_\_

Fax: \_\_\_\_\_ Email: \_\_\_\_\_

**NOTE:** If there are more than 2 initial donors, please attach a separate sheet with the same information for each donor.

May we share your story so that others may know the benefits of leaving a legacy?  Yes  No

### Your Initial Contribution

**IMPORTANT:** Please contact our office prior to sending and money or transferring securities.

Check Amount \$: \_\_\_\_\_

Securities # of Shares: \_\_\_\_\_ Company Name: \_\_\_\_\_ Approx. Value \$ \_\_\_\_\_

Mutual Funds # of Shares: \_\_\_\_\_ Company Name: \_\_\_\_\_ Approx. Value \$ \_\_\_\_\_

Other Description: \_\_\_\_\_

### Instructions for Stock Transfer

If transferring securities or mutual funds through a broker, please give the following account information to your broker. Funds or securities should be transferred to:

**Wedbush Morgan, Inc.**

**Broker: Mike Sherman 480.778.8540**

**Account: 8945-9347 DTC #0103**

## Designation

To:  Endowment Fund Name: \_\_\_\_\_

For  Parish \_\_\_\_\_

School \_\_\_\_\_

Ministry \_\_\_\_\_

Other \_\_\_\_\_

Please provide any other guidance that you may deem helpful in our compliance with your charitable intentions.

## Investment Recommendation

You may select the balance of securities and fixed income for your fund's investment profile. Please choose from the following options, or you may defer this decision to the Catholic Community Foundation's Investment Committee.

### Equities / Fixed

- 80% / 20%\*
- 50% / 50%
- 0% / 100% Money Market

\*Recommended by the Foundation's Investment Committee

## Signature

I hereby irrevocably give the property described in this application and its attachments to the Catholic Community Foundation to establish an endowment fund.

I intend that this fund be operated exclusively for charitable purposes, and that it be treated as a component fund of the Foundation.

I understand that the Foundation's Board of Directors is empowered to modify any restriction related to the fund if in its judgment such a restriction becomes, in effect, unnecessary, incapable of fulfillment, or inconsistent with charitable needs. I acknowledge that I have read and agree to the Endowment Fund Terms and Conditions. I understand that the Foundation's Board of Directors reserves the right to modify the Endowment program and the Terms and Conditions as it deems necessary.

I hereby certify that to the best of my knowledge all of the information presented in connection with this application is accurate and I will notify the Foundation promptly of any changes.

\_\_\_\_\_  
Donor's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Donor's Signature

\_\_\_\_\_  
Date