IMPACT FOREVER.

Your endowment fund can permanently change the effectiveness and the reach of the organizations and charitable causes you value most.

Whatever your goal, the Trust can help you achieve greater results. Enhance your philanthropic impact with an endowment fund through The Chicago Community Trust.

The experts of the Trust, in consultation with your advisors, can determine the optimal arrangement for your goals and preferences.

Please allow us to help you, your family and your advisors realize your dreams. We look forward to speaking with you.
DIFFERENT PATHS TO PERPETUITY.

When establishing your philanthropic legacy, choosing the right option can roughly the effects of what you wish to achieve. With all the choices available, how best to choose?

A simple process will bring you closer to an ideal and practical solution for you and your family. Consult with your legal and financial advisors and with The Chicago Community Trust. Collectively, we will clarify your options and offer recommendations for the optimal solution for your individual circumstances.

Decide the best way to provide the assets that will sustain your endowment fund.

Choose one or more of the four types of endowment funds that will correspond most closely to the nature of your philanthropic goals.

THREE ROUTES TO YOUR ENDOWMENT FUND.

Ordinarily there are three main routes to the creation of any of the four main types of endowment funds.

1. **Your current gift** can provide initial funding for an endowment fund. A wide variety of illiquid assets such as real estate or business interests can be used in addition to cash or securities to initially build your endowment fund.

2. **Second, the conversion of your private foundation or a current gift from your estate.**

3. **Third, a bequest from your estate.** Instead of gift in addition to the conversion of a private foundation or a current gift, a bequest from your estate can provide the assets to build your permanent endowment fund.

Once you have made the decision to create an endowment fund via one or more of these three routes, select the type of endowment fund you prefer. Your options include:

**DONOR ADVISED ENDOWMENT FUND.**

Donor advised endowment fund are an efficient alternative to a private foundation and can serve as a primary vehicle for perpetual giving. This option enables the donor and up to two successor generations to advise grant making that adheres to their documented objectives.

**DESIGNATED FUND.**

Designated fund can provide the assets to build your permanent endowment fund. "Highest and best use” of philanthropic assets is what makes a designated fund attractive to many donors.

**FIELD OF INTEREST FUND.**

Defining the focus but not the details is the appeal of a field of interest fund. Like other permanent vehicles funded by your foundation or your estate, a field of interest fund provides a mechanism to honor your intentions forever. Simply define the causes you care about and turn over grant making responsibility to the Trust.

**DISCRETIONARY FUND.**

Defining the focus but not the details is the appeal of a field of interest fund. Like other permanent vehicles funded by your foundation or your estate, a field of interest fund provides a mechanism to honor your intentions forever. Simply define the causes you care about and turn over grant making responsibility to the Trust.

**TYPE OF ENDOWMENT FUND**

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**DONOR ADVISED ENDOWMENT FUND.** Hands-on grant making for you and up to two successor generations.

**DESIGNATED FUND.** Support for one or more specific institutions or organizations of your choice.

**FIELD OF INTEREST FUND.** Support for qualified organizations in the areas of activity you select.

**DISCRETIONARY FUND.** Support for the most pressing needs in any field as identified at the time of disbursement by the grant making experts at the Trust.

**COMMON TO ALL FUND TYPES**

- Permanent support for your philanthropic legacy
- Professional investment management provided by the Trust
- Expert philanthropic consultation with the professionals of the Trust
- Professional investment management provided by the Trust
- Please let us know if you have already made the Trust a beneficiary of your estate plan. By making us aware of your intentions, you can ensure that the Trust will structure your estate gift in a way that fulfills your interests. You also help us achieve a stronger and more realistic sense of what we can do for metropolitan Chicago in the future. Your desire for privacy or anonymity is always treated with the utmost confidence.

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