

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.

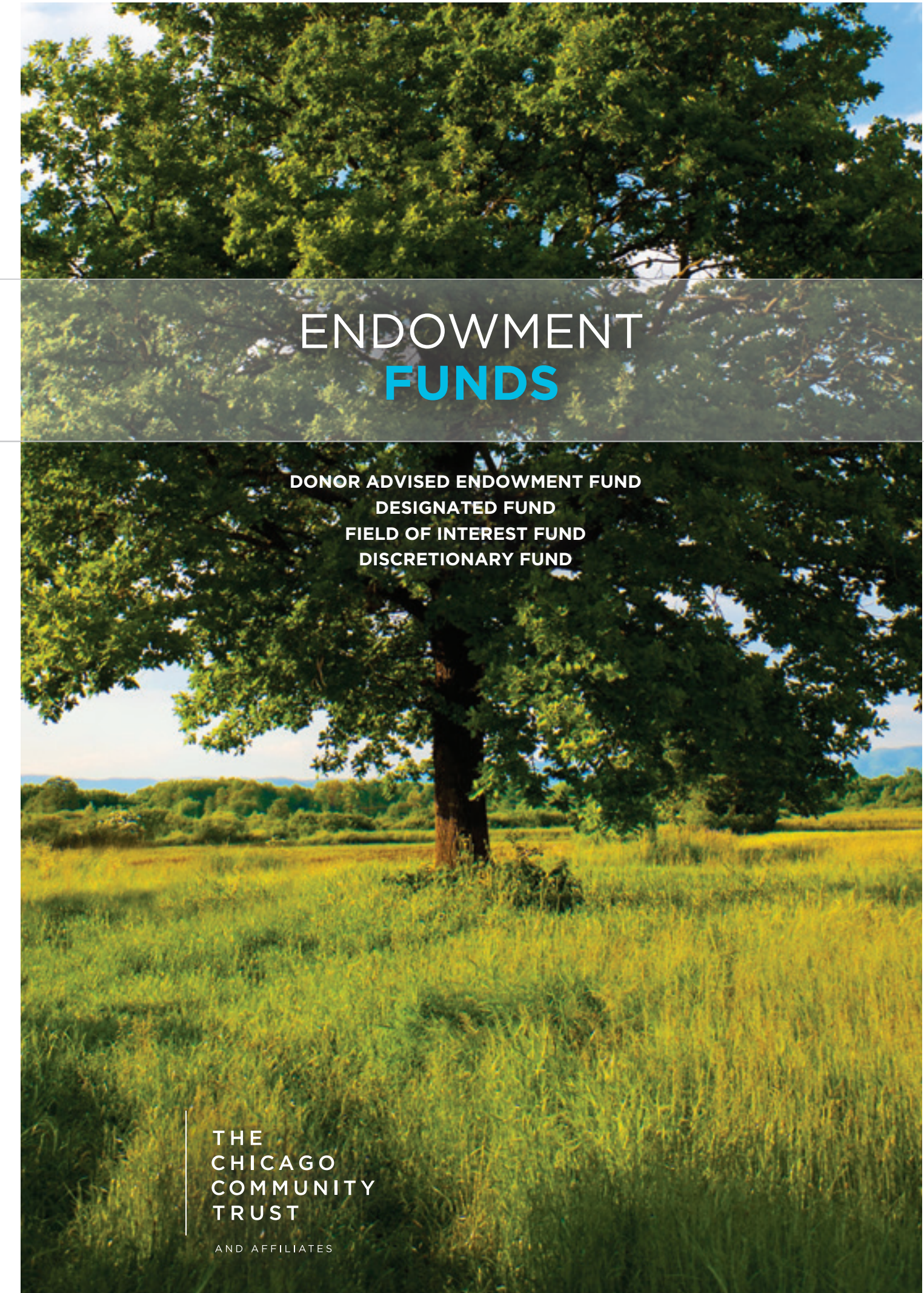
Please allow us to help you, your family and your advisors realize your dreams. We look forward to speaking with you.

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ENDOWMENT FUNDS

DONOR ADVISED ENDOWMENT FUND
DESIGNATED FUND
FIELD OF INTEREST FUND
DISCRETIONARY FUND

THE
CHICAGO
COMMUNITY
TRUST
AND AFFILIATES

DIFFERENT PATHS TO PERPETUITY.

When establishing your philanthropic legacy, choosing the right option can magnify the effectiveness of what you want 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:

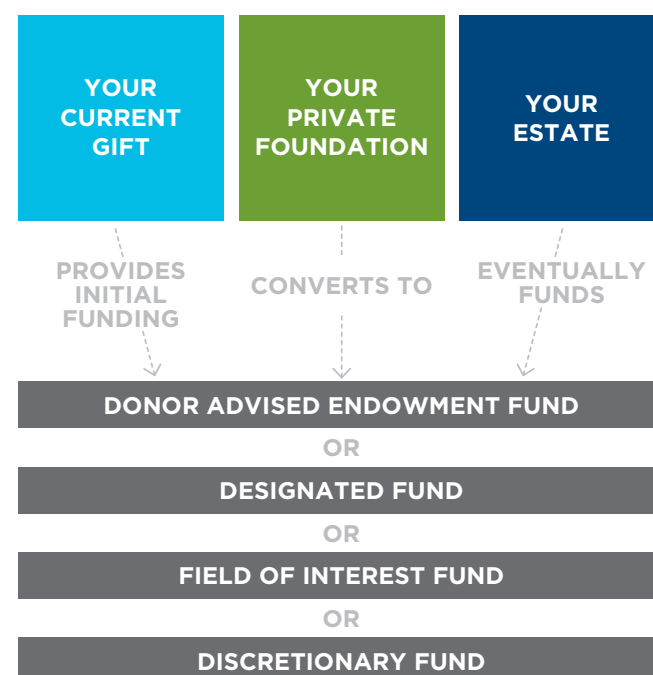
Consult with your legal and financial advisors and with The Chicago Community Trust. Collectively, we will clarify your options and offer recommendations for the optimal solution for your individual circumstances.

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.



First, 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.

Second, the conversion of your private foundation. This can take place while you are living or later via your estate.

Third, a bequest from your estate. Instead of (or 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. Remaining actively engaged in the granting process is one reason for a family to consider a donor advised endowment fund. This option enables the donor and up to two successor generations to advise grant making that adheres to their documented objectives.

A donor advised endowment fund is an efficient alternative to a private foundation and can serve as a primary vehicle for perpetual giving.

DESIGNATED FUND.

Providing continuous support to one or more specific nonprofit organizations 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 identify the causes you care about and turn over grant making responsibility to the Trust.

Your field of interest can be as broad (“improving health in Chicago”) or as narrow (“supporting public sculpture in the Loop”) as you like — but it becomes the defining standard by which the Trust will make grants on your behalf and in your name if you so choose.

Usually a provision in the agreement stipulates what will take place if the nature of the need changes in the future. For example, if a donor supports disease research and the disease is cured 50 years from now, the assets may be applied toward a named secondary cause or toward the general purposes of the Trust.

DISCRETIONARY FUND.

“Highest and best use” of philanthropic assets is an objective met when you establish a discretionary fund to be administered by the Trust.

Funds are always applied to the community’s most pressing needs at the moment of disbursement. No matter how circumstances and organizations may change in the future, discretionary funds within The Chicago Community Trust never become obsolete or misappropriated — their relevant purpose remains intact forever.

TYPE OF ENDOWMENT FUND	YOUR PHILANTHROPIC GOAL
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 FOUR FUND TYPES	Permanent support for your philanthropic interests, fulfilling your philanthropic legacy
	Anonymity or recognition for your giving
	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 intentions. 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.