

CREATE YOUR GIVING CIRCLE FUND



GIVING CIRCLE FUND WORKBOOK

Together with others, our collective impact grows. Giving circles are about change, possibility and growth. By gathering individuals who want to learn and work collaboratively, we increase effectiveness, involvement and impact in our shared communities.

YOUR GIVING CIRCLE NAME

Giving Circle Name _____

Faith / Charity Affiliation (optional) _____

Name of Chairperson / Lead Organizer _____

Phone _____

Email _____

Address _____

City/State/Zip _____

YOUR GIVING CIRCLE'S FUND ADVISOR (Others to be given authorized access)

(If different than chair / lead organizer)

Giving Circle Fund Advisor _____

Title _____

Email & Phone _____

Others to Be Given Access:

Name _____

Email & Phone _____

Name _____

Email & Phone _____

PROFESSIONAL ADVISOR

Are you working with a professional advisor to establish this giving circle fund? (e.g. financial representative, fundraising consultant, CPA, attorney, etc.).

Yes No

Professional Advisor's Name _____

Title _____

Email _____

Daytime Phone _____

YOUR GIVING CIRCLE FUND

Giving Circle Name _____

Expected Gift Amount Per Member _____

(Required minimums: \$200 per contribution/\$1000 total per fund)

Grantmaking Strategy

- Grant in Full** - Select charity or charities to receive grants with the intention to deplete full giving circle fund balance each giving cycle annually - 1% up front administrative fee assessed on each gift before grantmaking
- Invest & Grow** - Invest gifts for growth, granting a percentage each year, or on as needed basis for charitable support (i.e., the fund should carry a balance for three years or more) - 1% annual administrative fee assessed on fund value for balances of \$10,000 or more (.25% quarterly) or \$100/year (\$25/quarter) on balances less than \$10,000

INVESTMENT ALLOCATION

- If you intend to grant the majority of assets within a 1-3 year horizon, invest in money market securities is recommended to protect principal
 - If your investment horizon is longer, you may select among one or more InFaith investment portfolios to match your grantmaking needs. Please select your fund's investment allocation:
 - Core Growth Portfolio (85% equities/ 15% fixed income)
 - Mission Growth Portfolio (85% equities / 15% fixed income)
 - WomenInvest Portfolio (75% equities / 25% fixed income)
 - Income Portfolio (100% income)
 - Custom Allocation (customize your investment allocation among two or three portfolios, including a 100% fixed income portfolio)
 - _____ % Core Growth Portfolio (85% equities/ 15% fixed income)
 - _____ % Mission Growth Portfolio (85% equities/ 15% fixed income)
 - _____ % WomenInvest Portfolio (75% equities/ 25% fixed income)
 - _____ % Income Portfolio (100% fixed income)
- *Custom allocation must total 100%*

For more information on InFaith portfolios, visit inFaithFound.org/about-us/financials-reports.

As required by law, investment recommendations are advisory only and InFaith Community Foundation may, at its discretion, follow or decline to follow your recommendation. InFaith may at any time at its discretion change the investment of all or any portion of the assets in the Giving Circle Fund, and the investments will be administered in accordance with applicable InFaith policies in any case. Investments are subject to normal market and interest rate fluctuation risks, and any gain or loss generated by the above investments will be reflected accordingly in the Giving Circle Fund's value. You may recommend a change to your giving circle's investments at any time.

DISCLOSURE

Disclosure in InFaith publications. From time to time, gift information is published in publications such as the annual report, newsletters and social media.

- We authorize InFaith to publish our giving circle name in InFaith publications
- We authorize inFaith to share the name of our Giving Circle Fund with charities when grant distributions are made

CONTINGENT CHARITABLE BENEFICIARY

In the event this Giving Circle Fund ends upon the death, incapacity, or resignation of the last surviving advisor, we recommend you to name a Contingent Charitable Beneficiary to receive the remainder of the Giving Circle Fund.

Contingent Charitable Beneficiary _____

Additional Notes (optional) _____

We wish the named charity/charities:

- Receive the Giving Circle Fund's full remainder
 - Receive annual grants in perpetuity
 - Receive 10% annually for 10 years, and then the Giving Circle Fund's remaining value.
-

ADDITIONAL INFORMATION

How did you learn about InFaith Community Foundation? (mark all that apply)

- Attended a WomenGive inFaith event
 - Recommended by a friend/family member
 - Recommended by a Thrivent Financial representative
 - Recommended by a professional advisor
 - InFaith website
 - Advertisement
 - Other _____
-

GIFT ACKNOWLEDGMENT

I hereby acknowledge that I intend to make an irrevocable gift to my Giving Circle Fund. With my gift, I understand that I will be transferring all gift ownership and legal control to InFaith Community Foundation for the benefit of my Giving Circle Fund, subject to acceptance by a InFaith Community Foundation officer.

Donor Signature: _____ Date: _____

Donor Signature: _____ Date: _____

Return Completed Form to:

InFaith Community Foundation
625 Fourth Avenue South, Suite 1500
Minneapolis, Minnesota 55415
Direct: 800-365-4172
Fax: 612-844-4109

VISION

Throughout our community and by God's grace, we will achieve effective, positive and lasting change.

MISSION

To serve our donors with integrity as together we change lives and spread joy by sharing our blessings with the world.

VALUES

As a Christian organization, our work reflects our service, stewardship, collaboration, possibilities and results.

QUESTIONS

Please contact us at any time by calling 800-365-4172 or emailing contactus@inFaithFound.org.

WE OFFER

- Donor advised funds, collaborative funds, organizational endowments and giving circles
- Breadth of giving options, including bequests, cash, stock, real estate, life insurance, charitable gift annuities and charitable remainder trusts
- Flexibility to give to any charity and make changes if you wish
- Maximum tax benefits based on when and how you give
- Donor-centered and online services
- Mission-based investment options for charitable assets

InFaith Community Foundation is committed to environmental stewardship, printing on paper made from 100% post-consumer fiber using Green-e Certified renewable energy and meeting Forest Stewardship Council standards.

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