



INFAITH ENDOWMENT NEWS

April 2018

InFaith Community Foundation values endowment fund relationships and listens to your feedback. In last year's endowment fund survey, fund advisors stated preference for electronic communication by email and online fund access. We're here to serve you, which is why we're excited to launch this quarterly e-newsletter.

Each month following the calendar quarter-end (April, July, October and January), you will receive this newsletter by email. Each issue of *InFaith Endowment News* will contain an investment update, a planned giving topic to share with your supporters and an opportunity to grow awareness of your organization's endowment fund.

Quarterly Statement & Investment Update. Your organization's quarterly statement is now available online. If you are your organization's endowment fund advisor, [click here](#) to log in and access your statement. If you are not a fund advisor and would like to see your organization's statement, speak to your fund advisor for access.

For this quarter's investment performance update, please visit [our website](#).

Planned Giving & Tax Reform. There are plenty of headlines and speculation on how The Tax & Jobs Act of 2017 will affect charitable giving in the U.S., since the standard deduction was doubled and many taxpayers will likely no longer itemize. In the past, approximately 24% of all taxpayers itemized charitable gifts among their deductions.

Some may be surprised to learn that people's reasons for giving are not primarily for the tax deduction. Based on InFaith donor surveys, the top motivator for giving is to address community needs. Second is giving in response to life's blessing and as an expression of faith. Personal financial benefit and tax advantages ranked a distant third. In national surveys, it ranks fifth.

Following recent tax reform, two giving solutions – QCDs and “bundling” – are expected to grow in popularity given higher thresholds for itemized deductions.

- **Qualified Charitable Distributions.** People 70 ½ or older may give directly from their IRAs without having to recognize income, by making “qualified

RESOURCES

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Did you miss InFaith's annual Investment Conference Call? The recording [is available here](#).

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Feel free to forward this to others in your organization who you feel may be interested.

charitable distributions” (also known as QCDs). Donors may distribute any amount, up to \$100,000/year, and these QCDs count towards their Required Minimum Distribution (RMD). QCDs must be made directly from the IRA plan administrator to the charity. These distributions can be directed to your endowment fund or to create a charitable fund at InFaith. Contact InFaith for more information on sharing this opportunity with your supporters.

- **“Bundling.”** This strategy describes how supporters can “bundle” two or more years of charitable contributions into one year to meet the new threshold required for itemization. This provides an ideal solution for those seeking to support your endowment fund, or create a donor advised fund.

Based on individual giving motivations and the changes in tax reform, it is timely to raise awareness of your organization’s endowment fund and planned giving options for your supporters. InFaith staff is here to help your supporters give wisely and in expanded ways. InFaith’s full range of giving options is available to help your supporters make planned gifts to your church or nonprofit.

We hope you were able to join us on March 20 for InFaith and Thrivent’s webinar on how the Tax & Jobs Act of 2017 may affect giving to your church or nonprofit. If you were unable to attend, a recording of the webinar is [available here](#).

Building Awareness: Scholarships. Did you know InFaith offers a variety of scholarships for education assistance? In 2017, more than \$3.5 million in educational assistance was distributed thanks to the generosity of InFaith donors. Students at your church or faith-based nonprofit may qualify for one or more of InFaith scholarships.

Consider sharing the [InFaith Community Foundation Scholarship](#) directly with students at your church. This scholarship was established to benefit students who are members of congregations that hold active endowment funds at InFaith. One \$5,000 award will be given for the 2018-2019 school year.

Students who wish to apply for the scholarship program must complete an online application. The deadline for applications is April 30, 2018. More information, requirements and scholarship applications can be [found here](#).

Questions? We’re here to serve you. Call 1-800-365-4172. Feel free to forward this to others in your organization who you feel may be interested.

InFaith Community Foundation is a national charity with a mission to serve donors, spread joy and change lives. Through InFaith, gifts are tailored to each donor’s charitable interests and financial circumstances. InFaith Community Foundation is a proven steward of these gifts, earning consistently high ratings from Charitable Navigator for sound fiscal management and GuideStar for transparency and commitment to excellence. Together with donors, InFaith grants millions of dollars annually to charities serving local, national and global communities.



Charitable giving can result in significant tax, legal and financial consequences. Because the Foundation cannot give legal or tax advice, you are strongly encouraged to consult with your personal legal and tax advisors. To ensure compliance with IRS requirements, be aware that any U.S. federal tax advice that may be contained in this e-mail (including attachments) is not intended or written to be used, and cannot be used, for the purpose of (i) avoiding penalties under the Internal Revenue Code or (ii) promoting, marketing and recommending to another party any transaction or matter addressed herein.

inFaithFound.org | 800-365-4172 | 625 Fourth Avenue South, Suite 1500, Minneapolis, Minnesota 55415

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Has there been a change to your endowment fund committee? Let us know by [filling out this form](#).

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