



InFaith Endowment News

October 2018

Welcome to the third issue of InFaith Endowment News from InFaith Community Foundation. Endowment News is sent following each calendar quarter-end (April, July, October and January) and includes a link to your quarterly statement, an investment update, a planned giving topic for you to share with your supporters, ideas to grow awareness of your endowment fund and other timely updates.

Quarterly Statement. Your endowment fund's quarterly statement is now available online. If you serve as your organization's Fund Advisor, [click here](#) to log in and access your statement. If you are not a Fund Advisor and want to review your organization's statement, please speak to your Fund Advisor for access.

Update from InFaith Investment Advisors: Cambridge Associates & Veris Wealth Partners
Despite the combination of tariffs, Federal Reserve rate hikes, economic growth reports and other news affecting investment markets, third quarter 2018 was generally positive for most investment markets. Developed markets, including U.S. stocks, performed well in contrast to emerging markets equities. The performance of fixed income investments lagged as the Federal Reserve again increased interest rates. As we look forward, we believe that InFaith's disciplined and diversified long-term investment strategy positions the Foundation to capture positive investment performance and endure potential volatility.

View the [investment performance of each InFaith portfolio](#).

Planned Giving: [Appreciated Securities](#). Remind supporters of the opportunity to give long-term appreciated securities to your endowment fund. This is an easy and tax efficient way to support your endowment fund's mission. Benefits of giving appreciated assets:

- **Giving stock.** When securities are given to InFaith rather than sold by the supporter, they avoid paying capital gains taxes on the appreciated value.
- **Receive tax benefits.** The supporter benefits from an immediate charitable deduction.
- **More support to your endowment fund.** The mission of your church's endowment fund benefits from a larger initial gift than what may have been possible before.

Long-term appreciated securities, whether they are stocks or mutual funds, can provide a tax deduction for up to 30% of an individual's adjusted gross income, and any unused portion of the deduction exceeding this threshold may be carried forward for an additional five tax years. The result is often an even larger charitable gift than may have been expected. [Download the handout](#).

RESOURCES

[Contact an InFaith Gift Planner](#)

inFaithFound.org

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Raising Awareness: [Customized Endowment Brochure](#). As an organization with an endowment fund at InFaith, you have access to a variety of resources in the [Endowment Marketing Toolkit](#). One of these resources is a customized endowment brochure created by InFaith to be used to grow awareness of your endowment fund with supporters. You can customize sections to make it unique to your organization. [View more information and request form](#).

Thanks for those who joined us for the [Endowments for Tomorrow](#) webinar, which highlighted how organizations benefit from an endowment fund and shared opportunities to maximize your endowment fund's potential to support the mission of your organization. InFaith co-hosted the webinar with Thrivent Financial. Were you unable to join us? [View the recording](#).

Questions? Call 1-800-365-4172. Feel free to forward this to others in your organization who 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.

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