

Susan Smith Endowment Fund Update

- **What Is our Endowment Fund?**
 - It's a permanently restricted fund, established in 2009.
 - Each year a percentage, not to exceed 4% of the endowment's 13-quarter rolling average is distributed to supplement the operations of IWCF.
 - The rest is reinvested to ensure growth, maintaining funds to provide a consistent funding source to help ensure the long-term sustainability of IWCF with minimal increases to our standard annual contributions.
- **How to Contribute to our Endowment**
 - Annual donation beyond your \$1,125 renewal
 - Direct your Individual Grant Designation - \$500 or \$250
 - Donate In memory of a loved one or friend
 - Donate a portion of your Required Minimum Distribution from a 401(k)
 - Provision in your will and other planned giving instruments (Please let us know when you do this, so that we can officially recognize you!)
- **Integrity of Endowment**
 - Socially responsible investing
 - Approximately \$800,000, approaching our initial \$1M goal
 - This includes, since inception:
 - \$530,029 donations
 - \$288,773 earnings (net of investment fees)
 - \$39,984 distributions from the Endowment to support IWCF operations

