

Endowment Building Solicitation Letters/Email

Create awareness about
your endowment.



You can create awareness about building your organization's endowment a number of ways. Even though we may live in the digital age of communications with email and social media, there is something to be said about the power of the good old-fashioned letter.

Ask your board to send out letters and/or emails to potential donors. Involvement of the board is key to the success of your endowment.

In the following two examples, you will find several messages that may be communicated in your newsletter, articles, or other communication efforts.

Example 1 - Bequests

Dear Donor:

In the end we are all remembered for our acts—for the lives we touch and by the causes we advance. In that light, I invite you to consider creating a lasting legacy by including the [your organization] endowment fund in your long-term plans.

The word “endowment” simply means that your legacy gift will be managed by the Yampa Valley Community Foundation and invested for the benefit of [your organization]. The earnings from these investments will be contributed to [your organization] every year and then used by [your organization] to fulfill its mission.

You may create an endowment fund in your name or the name of another. Then each year a gift in the fund's name will be distributed to [your organization]. Legacy gifts take many forms including:

- Gifts made in your will or trust;
- Gifts that pay you income;
- Gifts of life insurance or retirement plan assets.

To learn more, please return enclosed confidential response card contact [your organization's contact person and contact info]. You may contact Susan Petersen, Community Impact Manager at the Yampa Valley Community Foundation at (970) 879-8632 or Susan@yvcf.org.

Sincerely,

Name

Title



Example 2 - Why an endowment fund?

Dear Donor:

The future is hard to predict. But one thing we do know is that we will need resources to fuel our mission in years to come. That's why we've established the [your organization] endowment fund at the Yampa Valley Community Foundation. The fund is professionally invested for the long-term. Each year, 4.5% of the average fund balance is distributed to us to support our ongoing needs.

That's why our endowment fund is at the Yampa Valley Community Foundation. Our endowment fund benefits from the Foundation's investment expertise and from being part of a large portfolio. The Foundation also handles all administrative details and investment responsibilities for our fund, freeing our staff to concentrate on our mission

You can play a part. There are a variety of ways to give that provide you with maximum tax and financial benefits. They include:

- A gift made in your will or trust;
- A gift that pays you income for life;
- A gift of life insurance or retirement plan assets.

To learn more, please return enclosed confidential response card contact [your organization's contact person and contact info]. You may contact Susan Petersen, Community Impact Manager at the Yampa Valley Community Foundation at (970) 879-8632 or Susan@yvcf.org.

Sincerely,

Name
Title

Response Card

It's important to include a response card with your solicitation letter, encouraging donors to "invite" you to contact them. Here's a simple message to include.

Please send me additional information about:

Creating a fund in my name for [your organization].

Making a gift that provides income during my lifetime.

I have included [your organization] in my long-term plans.

Name: _____ Address: _____

Phone: _____ Email: _____

Your response will remain confidential.