



HELP SHAPE THE FUTURE OF OUR COMMUNITY TODAY

YMCA Endowment Funds

The YMCA of the North has a long history of generous donors creating endowments to help fund its work. An endowment is a gift that keeps on giving—the gift is retained and invested, and the earnings support the donors' interests in perpetuity.

An endowment fund:

- Supports the donor's interests over many generations
- Creates a legacy that supports the YMCA mission in perpetuity
- Provides a stable source of revenue for the Y
- Makes the Y accessible to more people by providing financial assistance and supplementing program fees

The General Board of the YMCA of the North is responsible for the management of the endowment, including its preservation, growth, and use according to donor intent. The endowment is overseen by the Board Investment Committee, which is guided by a written YMCA Investment Policy for Endowments. This information is available by request.

How to Create an Endowment Fund

1. Decide the Purpose of the Fund

Endowment funds support the YMCA Association and its many branches, camps, or programs. Donors may add to an existing fund, or they may establish a new fund to match their charitable interests.

2. Determine What to Give

Donors may make a gift during their lifetime with cash, stock or real estate—or through an estate gift in a will, trust, IRA or insurance policy. The minimum gift required to create a new fund is \$10,000 paid all at once or over a period of time. Any amount may be added to an existing fund. Donors receive annual updates regarding the fund's performance.

3. Name the Fund

Donors often choose to name their endowment fund with their name, their family's name, or as a memorial to a loved one. If a donor wishes to remain anonymous, a name may be chosen that reflects the fund's charitable interest. The Y will protect the donor's identity and confidential information.

4. Mission Advancement Partners

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Endowment gifts are incredibly impactful and essential to the long-term financial health of the YMCA. They offer donors a wonderful way to leave a legacy for generations into the future.