



# ANNUALforALWAYS™

A program to help donors create an endowment for their favorite charity while still providing annual grantmaking

to create endowment to grant \$25,000 per year to charity...forever										
	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	Year 8	Year 9	Year 10
Annual to CFGC	\$ 73,000.00	\$ 73,000.00	\$ 73,000.00	\$ 73,000.00	\$ 73,000.00	\$ 73,000.00	\$ 73,000.00	\$ 73,000.00	\$ 73,000.00	\$ 73,000.00
portion to charity	\$ (25,000.00)	\$ (25,000.00)	\$ (25,000.00)	\$ (25,000.00)	\$ (25,000.00)	\$ (25,000.00)	\$ (25,000.00)	\$ (25,000.00)	\$ (25,000.00)	\$ (25,000.00)
balance to invest	\$ 48,000.00	\$ 48,000.00	\$ 48,000.00	\$ 48,000.00	\$ 48,000.00	\$ 48,000.00	\$ 48,000.00	\$ 48,000.00	\$ 48,000.00	\$ 48,000.00
endowment year start	\$ -	\$ 50,400.00	\$ 103,320.00	\$ 158,886.00	\$ 217,230.30	\$ 278,491.82	\$ 342,816.41	\$ 410,357.23	\$ 481,275.09	\$ 555,738.84
total to invest	\$ 48,000.00	\$ 98,400.00	\$ 151,320.00	\$ 206,886.00	\$ 265,230.30	\$ 326,491.82	\$ 390,816.41	\$ 458,357.23	\$ 529,275.09	\$ 603,738.84
investment at 5%	\$ 2,400.00	\$ 4,920.00	\$ 7,566.00	\$ 10,344.30	\$ 13,261.52	\$ 16,324.59	\$ 19,540.82	\$ 22,917.86	\$ 26,463.75	\$ 30,186.94
endowment total	\$ 50,400.00	\$ 103,320.00	\$ 158,886.00	\$ 217,230.30	\$ 278,491.82	\$ 342,816.41	\$ 410,357.23	\$ 481,275.09	\$ 555,738.84	\$ 633,925.78
										x 4%
credit card installments	\$6,084/month								per year to charity forever =	\$ 25,357.03
	\$18,250/quarter									

Notes	For illustration purposes only; actual investment returns are not guaranteed	To create a new donor-designed endowment, please complete a "New Fund Questions" form at <a href="https://www.cfgrundycounty.com/philanthropists/">https://www.cfgrundycounty.com/philanthropists/</a>
	To review CFGC's investment history, please visit <a href="http://cfgrundycounty.com">http://cfgrundycounty.com</a>	
	CFGC's endowment distribution policy is 4% averaged over a 12-quarter rolling average	
	Credit card installments can be created at <a href="https://www.cfgrundycounty.com/donate-online/">https://www.cfgrundycounty.com/donate-online/</a>	
	ANNUALfor ALWAYS™ is a program of Dollars and Sense	