



ANNUALforALWAYS™

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

| to create endowment to grant \$500 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 | \$ 1,450.00 | \$ 1,450.00 | \$ 1,450.00 | \$ 1,450.00 | \$ 1,450.00 | \$ 1,450.00 | \$ 1,450.00 | \$ 1,450.00 | \$ 1,450.00 | \$ 1,450.00 |
| portion to charity | \$ (500.00) | \$ (500.00) | \$ (500.00) | \$ (500.00) | \$ (500.00) | \$ (500.00) | \$ (500.00) | \$ (500.00) | \$ (500.00) | \$ (500.00) |
| balance to invest | \$ 950.00 | \$ 950.00 | \$ 950.00 | \$ 950.00 | \$ 950.00 | \$ 950.00 | \$ 950.00 | \$ 950.00 | \$ 950.00 | \$ 950.00 |
| endowment year start | \$ - | \$ 997.50 | \$ 2,044.88 | \$ 3,144.62 | \$ 4,299.35 | \$ 5,511.82 | \$ 6,784.91 | \$ 8,121.65 | \$ 9,525.24 | \$ 10,999.00 |
| total to invest | \$ 950.00 | \$ 1,947.50 | \$ 2,994.88 | \$ 4,094.62 | \$ 5,249.35 | \$ 6,461.82 | \$ 7,734.91 | \$ 9,071.65 | \$ 10,475.24 | \$ 11,949.00 |
| investment at 5% | \$ 47.50 | \$ 97.38 | \$ 149.74 | \$ 204.73 | \$ 262.47 | \$ 323.09 | \$ 386.75 | \$ 453.58 | \$ 523.76 | \$ 597.45 |
| endowment total | \$ 997.50 | \$ 2,044.88 | \$ 3,144.62 | \$ 4,299.35 | \$ 5,511.82 | \$ 6,784.91 | \$ 8,121.65 | \$ 9,525.24 | \$ 10,999.00 | \$ 12,546.45 |
| | | | | | | | | | | x 4% |
| credit card installments | \$121/month | | | | | | | | per year to charity forever = | \$ 501.86 |
| | \$363/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 https://www.cfgrundycounty.com/philanthropists/ |
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| | To review CFGC's investment history, please visit http://cfgrundycounty.com | |
| | CFGC's endowment distribution policy is 4% averaged over a 12-quarter rolling average | |
| | Credit card installments can be created at https://www.cfgrundycounty.com/donate-online/ | |
| | ANNUALfor ALWAYS™ is a program of Dollars and Sense | |