



ANNUALforALWAYS™

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

to create endowment to grant \$5,000 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	\$ 14,500.00	\$ 14,500.00	\$ 14,500.00	\$ 14,500.00	\$ 14,500.00	\$ 14,500.00	\$ 14,500.00	\$ 14,500.00	\$ 14,500.00	\$ 14,500.00
portion to charity	\$ (5,000.00)	\$ (5,000.00)	\$ (5,000.00)	\$ (5,000.00)	\$ (5,000.00)	\$ (5,000.00)	\$ (5,000.00)	\$ (5,000.00)	\$ (5,000.00)	\$ (5,000.00)
balance to invest	\$ 9,500.00	\$ 9,500.00	\$ 9,500.00	\$ 9,500.00	\$ 9,500.00	\$ 9,500.00	\$ 9,500.00	\$ 9,500.00	\$ 9,500.00	\$ 9,500.00
endowment year start	\$ -	\$ 9,975.00	\$ 20,448.75	\$ 31,446.19	\$ 42,993.50	\$ 55,118.17	\$ 67,849.08	\$ 81,216.53	\$ 95,252.36	\$ 109,989.98
total to invest	\$ 9,500.00	\$ 19,475.00	\$ 29,948.75	\$ 40,946.19	\$ 52,493.50	\$ 64,618.17	\$ 77,349.08	\$ 90,716.53	\$ 104,752.36	\$ 119,489.98
investment at 5%	\$ 475.00	\$ 973.75	\$ 1,497.44	\$ 2,047.31	\$ 2,624.67	\$ 3,230.91	\$ 3,867.45	\$ 4,535.83	\$ 5,237.62	\$ 5,974.50
endowment total	\$ 9,975.00	\$ 20,448.75	\$ 31,446.19	\$ 42,993.50	\$ 55,118.17	\$ 67,849.08	\$ 81,216.53	\$ 95,252.36	\$ 109,989.98	\$ 125,464.48
										x 4%
credit card installments	\$1,210/month								per year to charity forever =	\$ 5,018.58
	\$3,625/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/
	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	