An Endowment Fund provides a source of annual income to a Catholic organization of your choice. This fund is designed to function in perpetuity, making it possible for you to ensure long-term financial support to your chosen cause. Once established, anyone can make additional contributions to the fund in any dollar amount.

You can...

- Open an Endowment Fund with a minimum of $10,000
- Designate any Catholic organization, or leave unrestricted to serve the greatest need
- Open with cash, marketable securities or other assets
- Avoid capital gains taxes on long-term, highly appreciated assets
- Make a bequest from your will, trust, or policies

Key benefits

- The Catholic Foundation’s administrative fee is 75 basis points, or three quarters of one percent on an annual basis. This is the only fee/cost to you
- Fund at death with a gift or designation in your will, trust, or beneficiary designation
- Invested in accordance with the United States Conference of Catholic Bishops guidelines for Socially Responsible Investments
- Avoid capital gains taxes on long-term, highly appreciated assets
- Reduction in income taxes
- Provide a perpetual annual source of revenue for the charity of your choice
How does an Endowment Fund work?

Make a gift
Donate cash, non-publicly traded assets, or easily transfer appreciated stock to establish an Endowment Fund. Or roll-over your IRA mandatory distribution.

Investment
Funds are invested in accordance with the United States Conference of Catholic Bishops guidelines for Socially Responsible Investments. You can continue to make additional tax-deductible contributions.

Fund growth
Each year the endowment fund generates income allowing the fund to grow year over year.

Endowment distribution
Following The Catholic Foundation’s distribution policy and in-line with the fund agreement, a distribution is made annually to the agreed upon beneficiary.

Let’s talk

About Us
The Catholic Foundation’s mission is to inspire giving and assist donors to provide for the long-term needs of the 23-county Diocese of Columbus. The Catholic Foundation is one of the oldest and largest Catholic foundations in the country, distributing nearly $150 million throughout the diocese since 1985.

Why Us
The Catholic Foundation offers a way to leave a legacy uniquely aligned with Catholic values and beliefs. Additionally, the Foundation invests all funds in accordance with the United States Conference of Catholic Bishops guidelines for Socially Responsible Investments.