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Fundraising for Endowment Q&A

Date: September 28, 2023

Time: 1:00 – 2:00 Eastern

Presenter: Gary Pforzheimer
President, PG Calc



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Agenda

1. What is an Endowment?
2. The Endowment Virtuous Cycle
3. Submitted Questions
 - A. Fundraising
 - B. Administration and Spending
 - C. Investing
 - D. Sub-accounting
 - E. Stewardship
4. Live Questions



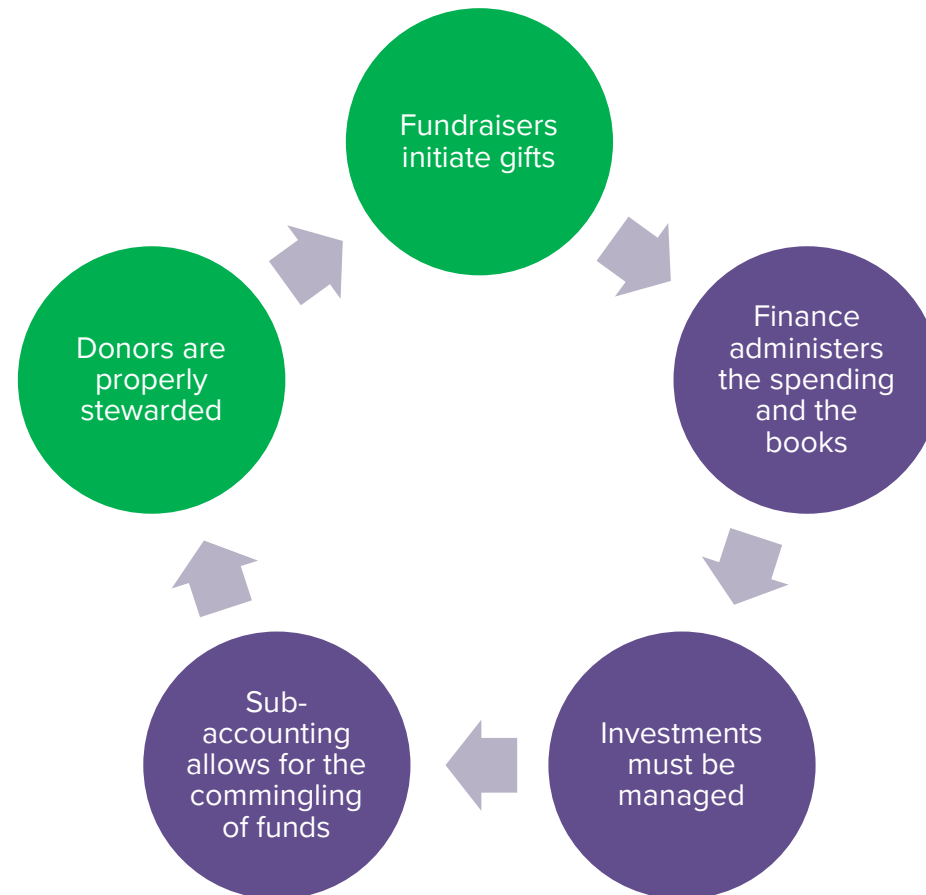
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What is an Endowment?

- A. To a donor, an endowment is a sum of money given to a charity for charitable purposes, with only the “income” being spent and “principal” being preserved.
- B. To an accountant, it is a fund which is “permanently restricted.”
- C. To a lawyer, it is an institutional fund not wholly expendable on a current basis under the terms of the gift instrument.

Erik Dryburgh, Adler & Colvin

The Endowment Virtuous Cycle





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Questions?



Click the Q&A icon at the bottom of your screen.



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Still Have a Question?

Contact: Gary Pforzheimer

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888-497-4970

- Everything we talked about today we do
- We have built this business the same way we perform administration of CGAs, PIF, and CRTs
- Call or email for an individualized discussion