


**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS



**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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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **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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**PG Calc** YOUR PARTNER IN PLANNED GIVING SUCCESS **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

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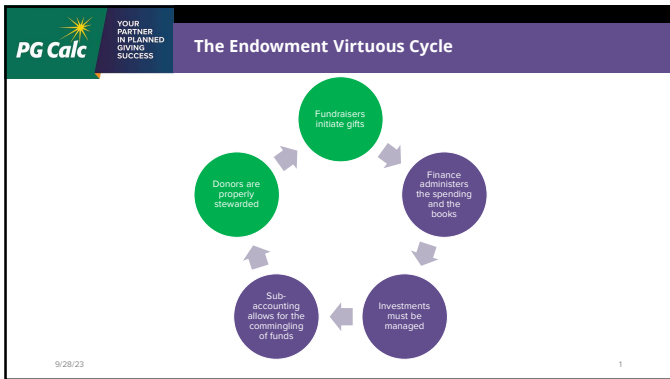
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### Questions?

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

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### Still Have a Question?

**Contact:** Gary Pforzheimer  
**E-mail:** gary@pgcalc.com  
 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

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