



Build Your Legacy with a Five-year Pledge Fund

Donors may create a Pledge Fund with the Four Way Community Foundation and make annual gifts to build up to a Donor Advised Fund or named endowed Charitable Beneficiary Fund. This is an excellent plan to establish for required minimum distributions from retirement accounts, or to introduce a family to the joys of planned charitable giving with annual donations that build a family giving pool for the future.

How it works:

A donor completes simple paperwork and then makes annual gifts towards either a Donor Advised Fund (\$15,000 minimum,) or an endowed fund (\$25,000 minimum.) Each year for up to five years, they contribute the minimum pledge, or more, until the threshold is reached. When the fund establishment level is met, the donor finalizes the fund agreement and the pledge fund converts into a completed fund, which may be added to as the donor decides.

Once a Donor Advised Fund is established, donors may then advise the Foundation where they would like the investment proceeds of their fund to be distributed. Similarly, an endowed Charitable Beneficiary Fund will begin making distributions when the establishment threshold is met. Donors may continue to add contributions to build the principal for as long as they wish. Bequests may also be added to the funds through a will or trust.

In the event that the Pledge Fund process is not completed and the threshold for a separate fund is not met, the accrued funds will become unrestricted gifts to the Four Way Community Foundation for use to meet its mission of promoting local philanthropy and nonprofit success in greater Josephine County, Oregon. Should the donor pass away before completing the pledge process, the Foundation will wait a grace period of one year to see if the pledge is completed by provisions made in the donor's will or trust before folding any pledges into the general fund.

Donor Advised Funds may have a secondary Advisor listed. This is an attractive option for intergenerational family legacies, allowing a donor's child or grandchild (at age 18 or above) to take over the fund in later years.

All pledge funds are permanent, irrevocable gifts, invested alongside the Foundation's other funds. Market downturns may result in the reduction of a fund's principal, which may result in an additional time period, without penalty, to complete. Investment increases are returned to the fund to aid in its growth toward the pledge goal. An annual report on fund performance is provided to the donor.

A representative of the Four Way Community Foundation would be happy to meet with you confidentially to discuss your giving goals and the different tools the Foundation offers to meet those goals and benefit the people of Josephine County forever.

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