

Annual Campaign Endowment Form

Whereas the undersigned has supported the Annual Campaign of the United Way of South Hampton Roads for many years, and

Whereas the undersigned continues to believe that the best way to benefit our community is by generously supporting the Annual Campaign and the volunteer based system of fund distribution to certified service delivery agencies as the most efficient and democratic method of making a difference, and

Whereas the undersigned desires to support the Annual Campaign in perpetuity,

The Undersigned therefore agrees to create a restricted endowment fund, the name of which shall be _____ Annual Campaign Endowment (the Fund) within the United Way of South Hampton Roads Foundation (the Foundation).

The Fund shall be created as a _____ lifetime gift / as a _____ testamentary gift

If a lifetime gift, attached herewith as Appendix A, is the description of assets being gifted to create the Fund (i.e. insurance policy, stock, tangible property, etc.).

If a testamentary gift, attached herewith as Appendix A, is the codicil or copy of pertinent sections of the will creating such a gift.

The Foundation, by signifying its acceptance of this agreement below, agrees on its part to create the _____ Annual Campaign Endowment as a restricted endowment fund, and from such fund to distribute its "income" (as defined in the Investment Policy and Guidelines of the Foundation), to the Annual Campaign, annually, in accordance with the payout policy established by the Board of Trustees of the Foundation.

In the event that an Annual Campaign is not conducted, the payout from the Fund shall be made to the Unrestricted Fund of the Foundation for distribution as determined by the Trustees.

_____ Date _____

_____ Date _____

Donor(s) signature

Accepted by:

_____Date_____
Michael Hughes, Executive Director
United Way of South Hampton Roads Foundation

This is not an Actual Agreement