

Choose the type of fund

At the Saint Mary's Scholarship & Benefit Fund, there are three types of funds you can choose from:

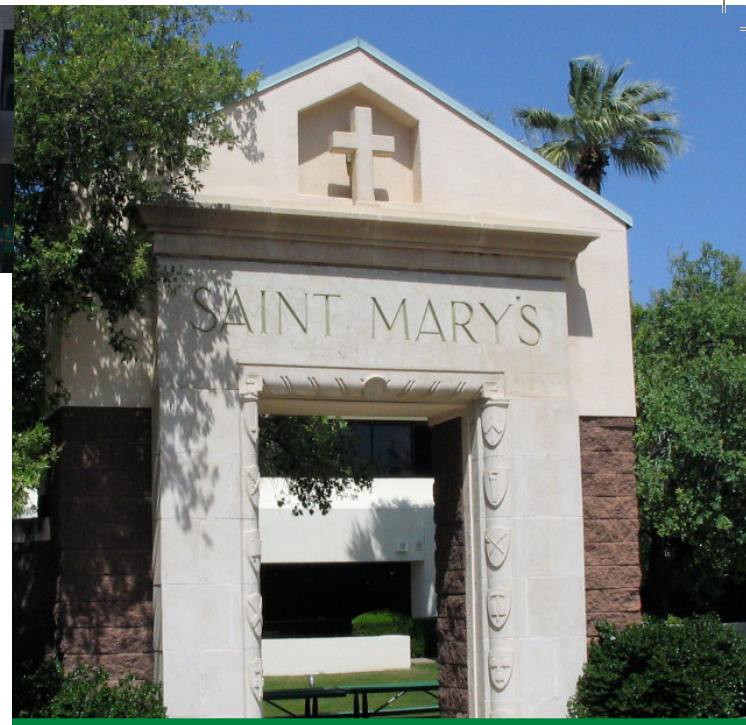
- ❑ Unrestricted Funds – allows us to respond to the most urgent and emerging needs that we face as a community
- ❑ Designated Funds – created by you for specific purpose or organizational need that is important to you
- ❑ Endowed Funds – supports the mission of the Saint Mary's Scholarship & Benefit Fund for years to come.

Select a name for your fund

Funds can be named after you or in honor or memory of someone important to you. You can even choose to remain anonymous.

Complete a simple governing document

Our staff will help you complete a simple form that will clearly describe your intentions for your fund.



DISCOVER THE EASE STARTING A FUND

WE CAN HELP

You can name a fund after yourself or in honor or memory of someone important to you. If you decide to invest in a fund with Saint Mary's Scholarship & Benefit Fund, we will work with you to create a fund that will serve your needs and ours. Together we will determine the purpose of the fund, develop a personalized fund description, describe the ideal wishes or projects to benefit from the fund and develop a plan to disperse funds. We will also devise a backup plan in the event the fund's original purpose becomes impractical or obsolete.

Our staff would be happy to meet with you to explore the options that can be the most beneficial to you, as well as how your gift can help develop future generations of Knights and Lady Knights. Please contact Karen Mankoski, Executive Director at (602) 256-4909 for an appointment.

CONTACT INFO

Saint Mary's Scholarship & Benefit Fund
2525 North Third Street
Phoenix, AZ 85004
(602) 256-4909 direct
(602) 251-2595 fax
kmankoski@smknights.org
www.smknights.org

A LEGACY OF CARING

**Be a Part of the Tradition at
Saint Mary's Scholarship & Benefit Fund**



A LEGACY OF CARING: BE A PART OF THE TRADITION AT SAINT MARY'S SCHOLARSHIP & BENEFIT FUND

The mission of Saint Mary's Scholarship and Benefit Fund is to provide resources to Saint Mary's Catholic High School, students, faculty and staff to ensure access to excellent academic, social, and cultural opportunities for all students. Our goal is to help shape the lives of young adults guided by Christian values ready to be thoughtful, responsible citizens and leaders throughout all aspects of society.

Making an investment in a beloved organization is a big decision. When you choose to make a gift of significance to the Saint Mary's Scholarship & Benefit Fund, know that you have choices in how your gift operates. The act of giving a gift to a charitable organization leaves many people with feeling of goodness and satisfies a deep need to help others. Your gift can provide recognition for you, someone dear to you or someone you hold in high-esteem; they also serve as endorsements of the good work of the Saint Mary's Scholarship & Benefit Fund.

Creating a fund at the Saint Mary's Scholarship & Benefit Fund is a wonderful way to honor the legacy of Arizona's oldest Catholic school as well as help develop the leaders of tomorrow. Funds provide financial support for scholarships, help you receive tax benefits, and build a legacy of supporting Saint Mary's in your name or the name of a loved one into the future. As a donor, you can choose to support a particular program, provide assistance for scholarships and/or academics, sustain the ongoing operations of Saint Mary's, or challenge other individuals to give.

UNRESTRICTED FUNDS

When you choose to give a gift to Saint Mary's Scholarship & Benefit Fund that is not restricted, you enable the Fund to respond to the most urgent and emerging needs that we face as a community. The Board of Directors of the Fund determines how these funds are utilized, setting priorities for their use and how these funds will be distributed to support Saint Mary's High School's program needs.

DESIGNATED FUNDS

As a donor to the Saint Mary's Scholarship & Benefit Fund, you can decide to establish a fund for a specific purpose or organizational need that is important to you. If you have a love for an academic subject, then establishing a designated fund to serve that might be right for you. For donors who want to honor a loved one who loves painting or singing, establishing a fund for the fine arts in their honor might be right for you. Whatever your passion, there is a way to create a designated fund that fulfills the passion of our kids too.

ENDOWED FUNDS

If your intent is to create a fund that will support the mission of the Saint Mary's Scholarship & Benefit Fund for years to come, then establishing an endowed fund might be the right choice for you. Donors who realize that these goals will be granted in future generations can choose to establish permanent, endowed funds whose income supports tuition and programs. An endowed fund at the Saint Mary's Scholarship & Benefit Fund can be established for as little as \$25,000.



DISCOVER THE EASE STARTING A FUND

The process of creating a fund at the Saint Mary's Scholarship & Benefit Fund is easier than you might think. Consulting a qualified attorney or financial advisor is strongly recommended to prepare and finalize your estate or when transferring finances. Working with a member of our staff, you will take the following steps:

Decide when you want to give

- Do you want to establish a fund now?
- Do you want to establish a fund through your estate?

Decide what to give

You may have different types of assets that can start a fund. Here are some examples of donations that can establish your fund:

- Cash
- Retirement plan assets
- Trusts
- Appreciated securities
- Life insurance

continue on next page