

# { HOW A GIFT BECOMES A FUND }

## 1 YOUR GIFT



INDIVIDUAL OR FAMILY



CORPORATION, BUSINESS OR NONPROFIT ORGANIZATION



## 2 GIFT OPTIONS



CASH



WILLS & ESTATE GIFTS



REAL ESTATE



STOCKS, BONDS & MUTUAL FUNDS



CLOSELY HELD STOCK



IRA CHARITABLE ROLLOVER



## 3 CHOOSE YOUR INVESTMENT POOL

AGGRESSIVE MIX

MODERATE AGGRESSIVE MIX

MODERATE MIX

CATHOLIC VALUES

CONSERVATIVE MIX

RISK AVERSE

CUSTOMIZED ALLOCATION

SEPARATELY MANAGED  
by your trusted Financial Advisor



## 4 CREATE & NAME YOUR FUND



DONOR & CORPORATE ADVISED FUND



DESIGNATED & AGENCY FUND



FIELD OF INTEREST FUND



SCHOLARSHIP FUND



PERMANENT (DISCRETIONARY) FUND



EMPLOYEE EMERGENCY RELIEF FUND



LEGACY FUND



## 5 GRANT TO CHARITABLE ORGANIZATIONS



EDUCATION



HEALTH & HUMAN SERVICES



CHURCHES



DISASTER



NONPROFIT COMMUNITY ORGANIZATIONS



YOUTH DEVELOPMENT