Legacy Partnership

How The Dayton Foundation Can Help Your Organization Build a Lasting Legacy

The Dayton Foundation
We help you help others.

A strong endowment can help your organization serve the community for generations. The Dayton Foundation's Legacy Partnership provides participating nonprofits with the guidance, resources and support needed to build lasting financial strength and advance their missions well into the future.



Planning Your Organization's Legacy

Nonprofit organizations today face increasing needs and decreasing resources. As a nonprofit professional, most of your fundraising efforts are likely focused on cultivating current gifts to meet these needs. As a result, planned-giving discussions with donors often are set aside for more immediate issues.

Did you know that endowment-building strategies can benefit your organization not just in the future, but also today? Studies show that annual giving can increase as much as 75 percent after a donor makes a planned-gift commitment. In addition, bequests are often the largest and most flexible gifts an organization will receive, creating lasting financial resources to help sustain an organization's mission. The Dayton Foundation's Legacy Partnership will better equip your organization to address current and future organizational needs.

Legacy Partnership Benefits

Collaborating with The Dayton Foundation on your planned-giving efforts can help you:

- develop a work plan that will ensure your organization is devoting sufficient time to endowment building;
- consult with donors, their professional advisors and your staff about planned- and current-giving strategies, supported by Foundation staff and educational resources;
- craft a vision for how a strong endowment will benefit your organization, one that your staff and board can share;
- strengthen your outreach through legacy brochures and other planned-giving marketing efforts, with advice from the Foundation's Marketing & Public Relations Department; and
- establish your organization as an effective and respected steward by including language such as "We partner with The Dayton Foundation for legacy planning" on organizational brochures and other promotional materials.

Endowed Fund Benefits

Endowed Agency Funds ensure long-term, sustained income for your organization. You may select one of our more than 80 investment managers to oversee your assets. Plus, the Foundation's sound investment oversight and trusted stewardship ensure the fund's assets are sustained and distributed to your organization as intended.

continued »

In addition, Endowed Agency Funds enable your organization to take advantage of:

- pooled investment accounts, allowing access to opportunities of scale, traditionally available only to large institutional investors;
- annual fund investment performance review;
- asset distribution pursuant to the terms outlined in the fund agreement; and
- long-term, sustainable funding for your nonprofit in perpetuity.

Types of Gifts

Another advantage for you and your donors is The Dayton Foundation's ability to accept a variety of planned or deferred gifts, including:

- life insurance;
- bequests;
- life estate remainder interest;
- remainder of retirement plan assets;
- charitable trusts; and
- life income plans.

In addition to leaving gifts to your Endowed Agency Fund, donors can create their own named fund at the Foundation that designates grants to your organization in perpetuity, over a period of time or as a one-time gift.

Sample Language for Bequests and Other Designations for Your Endowed Agency Fund

For a specific monetary or percentage bequest in a will or trust:

I give and bequeath (the sum of $ OR % of my estate) to The Dayton Foundation, Inc., to be held and administered as part of (name of your Endowed Agency Fund).

For beneficiary or Payable on Death designations from an IRA, life insurance, banking institution or investment account, indicate the following on the forms provided by the institution:

The Dayton Foundation

(For the benefit of your Endowed Agency Fund and fund #) Tax ID Number: 31-6027287

1401 S. Main St., Suite 100

Dayton, Ohio 45409

Phone: (937) 222-0410

Please note: It is important that your donors work with their attorneys to update their wills, trusts or financial documents to ensure assets are distributed to your Endowed Agency Fund in the manner they intend.

How You Can Learn More

Let us help you build a lasting legacy for your organization. For more information about The Dayton Foundation's Legacy Partnership, call (937) 222-0410 and ask to speak to a member of our development department. You also may visit daytonfoundation.org.

We're here to help you help others:

Nakia Lipscomb, senior director, development
nlipscomb@daytonfoundation.org | (937) 225-9954

Marianne Requarth, director, development
mrequarth@daytonfoundation.org | (937) 225-9926

Michelle L. Lovely, CFRE, senior vice president, Development and Donor Services
mlovely@daytonfoundation.org | (937) 225-9948