



COLORADO EPISCOPAL FOUNDATION



*Report of the Colorado Episcopal Foundation to the
134th Annual Convention of the Episcopal Church in
Colorado October, 2021*

Purpose Statement:

To strengthen capacity for mission and ministry by stewarding the financial resources of the Episcopal Church in Colorado.



Investment Management

- ◇ 70% of Episcopal churches in Colorado invest with us
- ◇ Utilize professional investment advisors
- ◇ Provide options to achieve short and long-term goals:
 - ◆ Limited Maturity Income Fund
 - ◆ Bond Fund
 - ◆ Equity Fund

Endowment Services

- ◇ Assist in establishing endowment
- ◇ Provide Sample endowment policies and procedures

Legacy Society and Planned Giving

- ◇ Establish Legacy Society
- ◇ Raise awareness regarding Planned Giving
- ◇ Provide Education on Spiritual and Financial benefits of Planned Giving
- ◇ Consult with individuals and congregations about specific gift planning strategies

Congregational Loans

- ◇ Assist Individual Parishioners' lending of money to their Church
- ◇ Keep Interest rates lower than a traditional bank loan

Real Estate Alienation and Encumbrance

- ◇ Work with and assist Parish or Diocesan Institution with the Alienation and Encumbrance process
- ◇ Advise and support the Bishop and Standing Committee on real property transactions

Stock Gifts

- ◇ Donate stock to fulfill annual or special pledge
- ◇ Tax advantages for donor
- ◇ Easy and effective

Gift Annuities

- ◇ Parishioner invests money with the Foundation
- ◇ Foundation pays the parishioner a fixed income for life
- ◇ Upon death, remaining funds are donated to the Church

End of life giving options

- ◇ Education and assistance with end of life planned giving options
- ◇ Bequest in will, retirement plan beneficiary, charitable trusts