

Endowed funds allow amazing things to happen at UW-Green Bay, from generous financial aid for students to the sparkling Chihuly glass sculpture at the Weidner Center for Performing Arts.

Since the University was established in 1965, generous donors have created more than 260 endowed funds. Many of these funds are directed by donors to specific purposes, from scholarships for first-generation college students and athletes involved in Division I teams to specialized facilities and equipment. UW-Green Bay carefully stewards each of these “promises.” Endowed funds continue to provide support year after year. This is crucial for an institution intended to serve generations of students.

## HOW IT WORKS

Choose to endow your gift of \$50,000 or more. Ask us about options for making gifts over time that add up to the minimum amount.

The fund can grow over time to generate an increasing stream of funding devoted to your interest areas.

Earnings are distributed in the form of scholarships to students or requested by faculty, deans and directors who oversee program expenses. Your gift — and all future income from your gift — is a permanent source of funding that supports UW-Green Bay and its students, forever.

### What are unique features of endowed gifts?

Endowment refers to funds meant to exist in perpetuity, such as a scholarship or professorship. These gifts are invested for the long term and intended to provide a permanent source of financial support for a designated purpose. Each year, a portion of the fund is paid out — 4.5 percent — and used for the purposes the donor and the Foundation agreed upon when the gift was made.

### How are endowed funds invested and managed?

Endowed gifts are pooled with others to achieve maximum investment efficiency and return. They grow with guidance from experienced local leaders and expert investment managers. The Foundation distributes the maximum from the endowment that is sustainable over time. Like most peer institutions, UW-Green Bay’s annual distribution is 4.5 percent.

#### YEAR 1

**\$500,000**  
donor establishes  
professorship



#### YEAR 10

**\$681,450** fund balance  
**\$259,606** total given out  
**\$30,665** available to  
spend in this year  
*(for research, project, program, salary  
expenses, for example)*



#### YEAR 20

**\$961,250** fund balance  
**\$613,267** total given out  
**\$43,256** available to  
spend in this year



#### YEAR 30

**\$1,188,309** fund balance  
**\$1,063,111** total given out  
**\$56,885** available to  
spend in this year



*Assumes 4.5% annual payout and 8% rate of return*

- An endowment gift allows you to make a permanent contribution to the University’s future. You can ensure the success of students and programs for generations to come.
- An endowment gift ensures that the University will have resources to withstand economic ups and downs or unexpected events.
- An endowment gift can be directed to a specific purpose or can be unrestricted. Fewer restrictions on gifts allow the Foundation to address needs that emerge in the future.
- An endowment gift allows you to perpetuate your annual contributions to causes you care about right now.