

EXAMPLES OF FUNDS:

Sally's father, James B. Garner 1893, taught at Wabash for several years from 1901-1914 and was the creator of the gas mask in WWI. With an outright gift of cash, she and husband, Gus, along with children and other family members pooled their gifts and honored her father's legacy by creating a scholarship for Bio-Chem majors.

Tom Houk '62, the son of an Indiana clergyman, was able to attend Wabash because of scholarship support he received. For his 50th Reunion, using a portion of his life insurance policy, Tom and his wife, Gayle, created the Houk Family Scholarship in his dad's honor, which will provide a scholarship for sons of clergymen attending Wabash.

Jim Smith H'50, who owned a Crawfordsville business for several decades, sent four sons to Wabash. Jim credits well-known teaching icons such as Lovell, Shearer, Rogge, Mielke, and Herzog for having a positive influence in Smith's business decisions. Jim and his wife, Susie, started a scholarship fund with cash and more will come later when an amount from a trust will be added.

WHAT ASSETS CAN I USE?

- > Securities (public and privately held) including stocks, bonds, and mutual funds
- > Real estate including homes and farms and commercial property
- > Tangible person property including:
 - Boats and vehicles
 - Artwork and collections
- > Retirement assets and life insurance
- > Remainder values from trusts, annuities, and of course...cash

MINIMUM REQUIREMENTS*:

Endowed Scholarship: \$100,000

Immersion Learning Fund: \$100,000

Department or Program Fund: \$100,000

Endowed Chair/Professorship:

Full tenured - \$2,500,000

Senior professorship - \$2,000,000

Professorship - \$1,500,000

Junior/visiting - \$1,000,000

*For scholarships, department, or program funds, a holding account may be started with \$50,000 until the fund grows to \$100,000

ENDOWED FUNDS: YOUR MEANINGFUL PHILANTHROPY...

- > Scholarships, Internships, Research
- > Specific Department Support
- > Faculty Initiatives, Immersion Learning
- > Unrestricted Annual Fund Support
- > Programs (e.g. MXIBS, CIBE, OLAB, WDPD, DAHV, GHI, Moot Court, etc.)

These are just some of the ideas – contact us to let us hear what *you* have in mind!

WABASH COLLEGE

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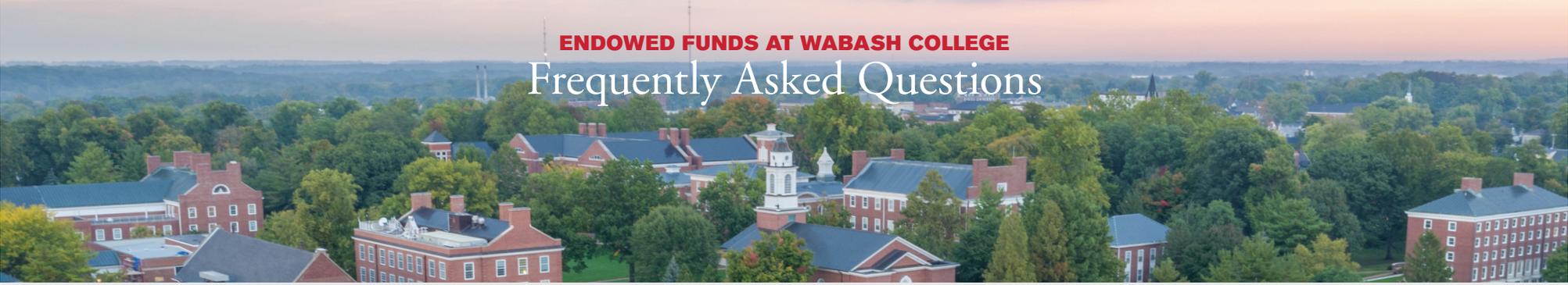
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ENDOWED FUNDS

Frequently Asked Questions



Wabash.



ENDOWED FUNDS AT WABASH COLLEGE

Frequently Asked Questions

Creating and Managing Endowed Funds at Wabash College

WHAT IS AN ENDOWED FUND?

Wabash invites alumni and friends to establish endowed funds at the College. Gifts that establish endowed funds rely on investment growth of principal to generate an amount available annually for the purpose of the fund. Striving for a donor-centered approach, Wabash seeks to match up donor interests with College needs. Endowed funds further strengthen the financial foundation of Wabash by freeing up other unrestricted funds so that those dollars may be used where the needs have gone unmet. Endowed funds are one way to create a permanent legacy at Wabash for you, your family, or a loved one. Funds can also be named to honor or memorialize someone who has had a positive impact on your life.

HOW DO I CREATE MY OWN ENDOWED FUND?

An Endowed Fund Agreement is a simple 2-3 page document signed by the College and the Donor(s). By signing this agreement and accepting a gift, the College assumes responsibility of adhering to donor intent as outlined in the document.

HOW MUCH OF THE FUND WILL BE USED?

The annual amount is typically held to approximately 4.0% to 5.0% of the fund's value based on the twelve-quarter rolling average of the endowment principal.

WHAT REPORTS WILL I RECEIVE AND HOW OFTEN?

Wabash generates and sends an annual report to donors for each fund, describing the historical value, current market value, and spendable amounts based on a June 30 closing date of the previous fiscal year-end.

HOW WILL I BE STEWARDED?

Your endowed fund agreement will specify how you or family members will be stewarded including, but not limited to, reports and any annual recognition given for your generous support.

WHO OVERSEES THE INVESTMENT STRATEGY?

The Investment Policy Committee of the Board of Trustees, including the CFO of the College, determines the spending and management policies. William J. Wheeler '83, President, Athene Holding, Ltd., chairs the Committee. The Committee and the College's OCIO, Strategic Investment Group, evaluate and build an asset allocation model that guides Wabash's investment decisions. The Committee oversees the activities and recommendations of the OCIO. The OCIO hires the firms who manage College investments and tracks their performance.

HOW ARE FUNDS MANAGED AND INVESTED?

The Investment Committee of the Board of Trustees of Wabash College approves the investment policies of the Endowment and oversees the implementation of the investment program. Since November 2015, Wabash College has partnered with Strategic Investment Group, a large Institutional Outsourced Chief Investment Officer (OCIO) provider. Strategic was founded in 1987 and has been a pioneer in OCIO services, managing over \$35 billion in assets including \$10.1 billion for not-for-profit institutions like Wabash College. Strategic serves as a co-fiduciary and focuses on its objective of delivering competitive net-of-fee returns for the endowment. Strategic provides a comprehensive investment platform for managing customized endowment portfolios, which allows clients like Wabash College to focus on their core missions. Additional information on Strategic Investment Group can be found on the Endowment Fact Sheet that Strategic has developed for the Wabash College Endowment.

ONCE ESTABLISHED, CAN I ADD TO A FUND LATER?

Yes, anyone may add to the fund at any point. Outright gifts and deferred gifts from estate or other forms of deferred giving are encouraged.