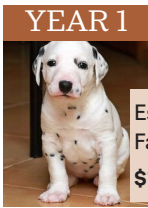
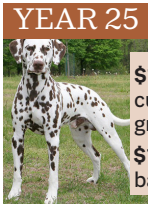


How Endowment Giving Works - *Forever*



YEAR 1

Establish your
Family Fund
\$100,000 gift



YEAR 25

\$132,000 in
cumulative
grants & fees
\$115,000
balance



YEAR 50

\$282,000 in
cumulative
grants & fees
\$125,000
balance

*Assumes 5.0% annual payout
and 5.5% rate of return

100-21=107

No, this isn't "new" math. The above "equation" does, however, represent the power of endowment giving and grant-making.

Mary Hollaway, who enjoyed a long career with Fahey Bank, generously created several funds at Marion Community Foundation through her will in 2011. Each was worth \$100,000. If we look at one of those funds as an example, that \$100,000 became a permanently endowed fund in her name: the Mary H. Hollaway Humane Society Fund.

Our prudently crafted spending policy at Marion Community Foundation allowed this fund, in its first four years, to grant \$21,000 to the Marion County Humane Society to support its charitable purposes. Equally well-crafted is our investment policy. By working closely with our local financial advisors and professional investment advisory group, Mary's fund grew to be worth \$107,000 in that same time. **So, even though the fund started with \$100,000 and gave away \$21,000, the fund still had \$107,000 in endowed assets.**

That's the beauty of endowment giving. Mary's endowed fund will continue giving ample annual grants in perpetuity to one of her favorite charities and continue to be prudently invested in order to support those annual grants. Based on sound calculations, we can project that over the next 25 years, Mary's fund will likely grant **\$132,000** and still be worth **\$115,000**. That makes our equation look like this: **100-132=115**. How's that for some nifty math? And, that pattern will continue well beyond those 25 years.*

We think Mary, who loved her pets and knew the value of a dollar, would be very pleased to know how her gift is working to improve our community and to know that it will continue for generations to come.

Mary H. Hollaway

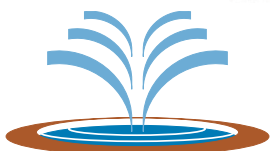
Mary H. Hollaway Donor Advised Fund

Mary H. Hollaway Humane Society Fund

Mary H. Hollaway Non Endowed Fund

Mary H. Hollaway Palace Theatre Fund and

Nobel F. Hollaway YMCA Scholarship Fund ■ est. 2010



**MARION COMMUNITY
FOUNDATION**

For You. For Marion. Forever.

504 South State Street, Marion, Ohio 43302

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www.MarionCommunityFoundation.org

