



WESTERN
ADVENTIST
FOUNDATION

W E V A L U E Y O U R T R U S T

Dear Friends:

Establishing a private endowment offers a meaningful and lasting way to support charitable initiatives aligned with your values. For those who wish to champion the mission of Adventist organizations for generations to come, a donor-established endowment provides an enduring legacy of faith and generosity. These funds are designed to preserve the principal while generating annual distributions to support education, healthcare, or other ministries that are close to your heart.

Background

Endowments are a time-honored tool for long-term charitable impact. Once established, they provide a consistent source of funding in perpetuity, ensuring that your philanthropic vision continues to make a difference—even beyond your lifetime. Unlike Donor Advised Funds, which allow for flexible grantmaking, endowments are structured for sustained, mission-driven support over time. Many Adventist institutions rely on endowment income to maintain financial stability and support critical work across the globe.

Practical Considerations

Western Adventist Foundation (WAF) partners with donors to create customized endowments tailored to specific charitable goals. Below are several key points to consider:

- Endowments are typically funded with an irrevocable contribution of cash, securities, or other assets.
- Donors may name their endowment in honor of a loved one or to reflect a particular area of ministry.
- The principal is invested for long-term growth, while annual distributions are made to support designated Adventist causes.
- Contributions may qualify for immediate tax deductions, subject to IRS guidelines.
- Endowments can be funded during life or through an estate plan as part of a broader legacy strategy.
- WAF manages all compliance, investment oversight, and can also make distributions in accordance with donor intent.
- The donor can also name a governing body, who can determine the eligibility for fund recipients.

How to Start

If you are considering establishing a private endowment, the first step is to reflect on the charitable legacy you wish to leave. Our development team will help you define your goals, select the appropriate structure, and complete the necessary documentation to launch your fund. Once in place, your endowment will provide reliable, ongoing support to the ministries and missions that matter most to you.

If you have any questions at any point, you should always feel free to contact us.

Sincerely,

Western Adventist Foundation



Western Adventist Foundation
A Ministry of the Pacific Union Conference
Since 1997
We Value Your Trust



Donor–Established Endowment Fund Application

Phone: (602) 220-0042
Fax: (480) 508-7810
Toll Free: 1 (866) 356-5595
Email: Info@wafsda.org

Western Adventist Foundation is a Seventh-day Adventist
Trust Management Corporation (WAF)
MAILING ADDRESS: PO Box 15430, Scottsdale, AZ 85267
FEDEX: 13825 N Northsight Blvd. Bldg. A-201, Scottsdale, AZ 85260

Instructions: Please write carefully with a blue or black pen.

DONOR INFORMATION

Identify the Donor for this Endowment.

Name: _____ Birth Date: _____

Address: _____ SSN: _____

City: _____ State: _____ Zip: _____ Phone: _____

Email address: _____

ENDOWMENT INFORMATION

Please review and answer the following questions for your endowment. If the endowment is funded with a testamentary gift, please attach some identifying information for the document and individual responsible for the future funding of the endowment.

Name of Endowment: _____

Endowment Beneficiary: _____

**If more than one charity will benefit, attach a separate sheet listing each charity.*

Stated Purpose of the Endowment: _____

The Governing Body of the Endowment: _____

**Please include an acknowledgement from the governing body unless WAF is designated to fulfill this role. If the donor will direct the endowment, write "donor directed" in the space above.*

How Often will Endowment Distributions be Made?: Quarterly ☐ Semi-Annually ☐ Annually ☐

What will be the Initial Funding Amount for this Endowment?: \$ _____

How will the Endowment be Invested?:

Conservative ☐ Moderately Conservative ☐ Moderate ☐ Moderately Aggressive ☐

ENDOWMENT OPTIONS

Please select all that apply.

- ☐ The donor/governing body for the endowment shall determine eligibility for fund recipients.
- ☐ _____% of the endowment's net income is to be reinvested annually (if zero, leave blank).

CONTACT INFORMATION FOR GOVERNING BODY

Please provide the contact information for the chairperson of the governing body, if applicable.

Name: _____ Title: _____

Role: _____ Permanent Role?: YES NO

Phone #: _____ Email Address: _____

ACKNOWLEDGEMENT OF TERMS

THE UNDERSIGNED HEREBY ACKNOWLEDGES that any funds delivered to WESTERN ADVENTIST FOUNDATION will be held in an interest-bearing account until such time as all final agreements are executed; at which time, said funds will be invested according to the undersigned's investment option selection made above.

THE UNDERSIGNED HEREBY ACKNOWLEDGES that each account is subject to an annual charitable administrative fee to cover endowment operating expenses such as grant making, recordkeeping, audits, tax filing, statements and other legal and fiscal responsibilities. A fee schedule is available to all donors before they make their initial contributions.

THE UNDERSIGNED HEREBY DECLARES, under penalty of perjury under the laws of the State of his/her jurisdiction, that he/she is authorized to execute this Application on behalf of the Corporate body or other Principal and, further, that WESTERN ADVENTIST FOUNDATION is hereby authorized to make inquiries and receive from third persons, whatever information may be necessary in connection with this Application.

THE UNDERSIGNED HEREBY DECLARES the information set forth above is true, correct and accurate.

Signature of Endowment Applicant: _____ Date: _____