Endowment Gift Case Studies

Nick and Nora Newark have spent most of their lives in the Newark community and are very involved in a number of charitable causes. Their favorites are their church, the local theatre group, and a shelter for homeless families in transition.

Each year, they make gifts to these three organizations that total about $4,000. They are in the process of reviewing their wills, and happened to receive a mailing from the shelter about your endowment building efforts and planned giving. While the bulk of their estate will go to their three children, they think they might include gifts to their favorite Newark organizations as well.

What kind of gift(s) might suit their purposes?