



# John Marshall High School Alumni Association, Inc.

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## SUPPORTING THE JOHN MARSHALL ALUMNI ASSOCIATION ENDOWMENT FUND

The John Marshall Endowment Fund exists to provide scholarship assistance to graduating seniors of the high school as well as to fund other education opportunities at the school for which students would normally have to raise funds, such as vocal competitions. In 2003, the John Marshall Alumni Association began a partnership with The Cleveland Foundation to help grow the endowment fund through offering a variety of giving opportunities. A list is provided below with a brief explanation – as with any major financial decision, consultation with a trusted advisor should be considered.

### Giving Now

Cash Gifts are attractive because they are simple to make, immediately effective, and easily earmarked for endowment purposes. Donors are encouraged to give to the endowment fund at any time, and checks can be sent to: The Cleveland Foundation, Gift Planning/Donor Relations department, 1422 Euclid Avenue, Suite 1300, Cleveland, Ohio 44115. Please make checks payable to the John Marshall Alumni Association Endowment Fund.

Appreciated assets may also be an option to consider when making a gift. These assets include stocks, bonds, mutual funds or real property.

### Future Giving

**Bequest by Will** – An outright bequest through a will or trust to the John Marshall Alumni Association is one of the simplest ways to make a future gift. Specific language can be provided to you and your attorney to make a gift of a specific amount, a percentage or a residual portion of your estate.

**Charitable Gift Annuity** – A gift annuity is a contract, issued by The Cleveland Foundation, that provides a stream of payments based on the age(s) of the beneficiaries in exchange for an irrevocable gift. The gift offers a charitable tax deduction for the value of the future remainder amount, and a portion of the payments may be tax free.

**Charitable Remainder Trust** – A charitable remainder unitrust allows the transfer of assets to an irrevocable trust that will generate payments. Beneficiaries (perhaps the donor(s) or other family members) receive payments representing either: 1) a percentage of the trust's annual value, or 2) a fixed annual payment. A charitable deduction for a portion of the assets placed in the trust is available, and other tax benefits may apply. At the trust's maturity, its assets may benefit the John Marshall Alumni Association.

**Charitable Lead Trust** – A lead trust provides income payments to a charitable organization for a period of years. At the end of the term, the trust's assets are returned to you or other non-charitable beneficiaries. By using this technique, you may enjoy estate or gift tax benefits.

*If you would like additional information about any of the gift techniques listed here or would like to discuss other ideas about supporting the association, please contact the Gift Planning/Donor Relations department of The Cleveland Foundation (216) 861-3810.*