FINANCIAL BENEFITS FOR INDIVIDUALS

Endowment Fund with a personal gift

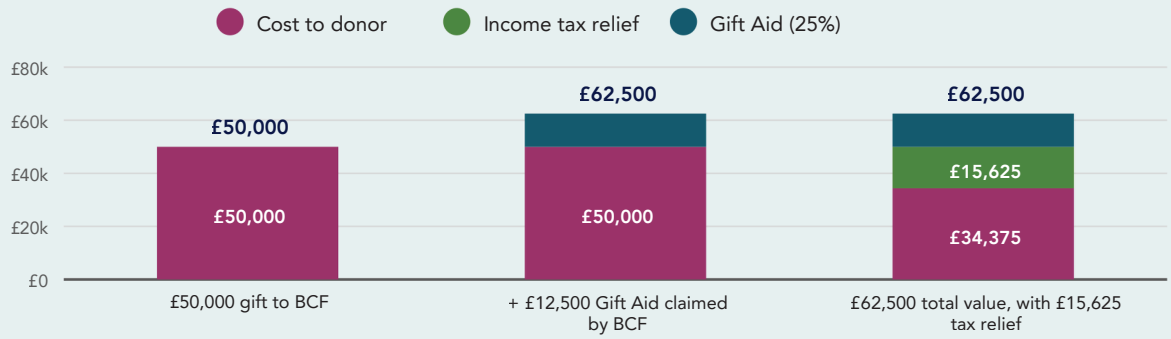
BERKSHIRE COMMUNITY FOUNDATION
Local Giving. Lasting Impact.

A charitable gift made by a UK tax payer from personal income to Berkshire Community Foundation (BCF) is eligible for Gift Aid and higher rate tax relief. This reduces the cost of the donation to the donor and increases the value of the Endowed Fund.

In effect, the Fund to Gift ratio is 1.82 to 1.

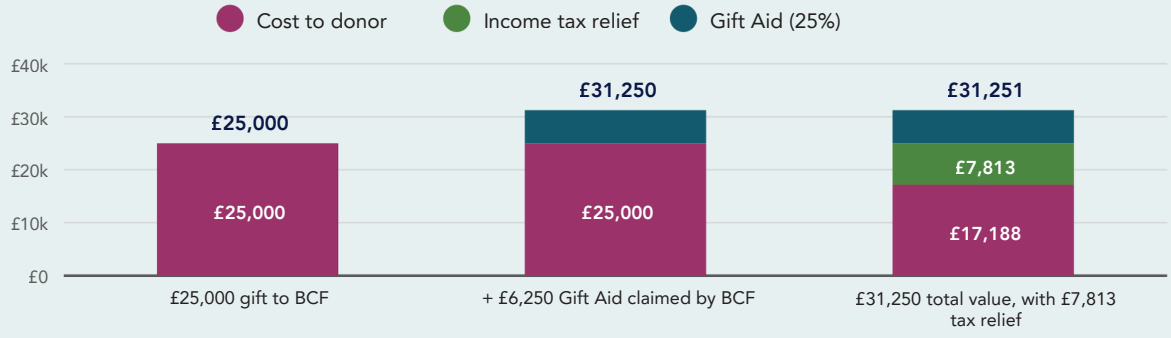
A Gift of **£50,000** creates an Endowed Fund of **£62,500**.The effect of tax relief reduces the cost to the donor to **£34,375**.

A £50,000 gift



A Gift of **£25,000** creates an Endowed Fund of **£31,250**. The effect of tax relief reduces the cost to the donor to **£17,188**.

A £25,000 gift



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UK Community Foundations
Registered Charity No. 1155173

Fund performance

Once created, an Endowed Fund is invested by Berkshire Community Foundation together with other such funds to generate capital growth and income for charitable distribution. As an illustration, **an Endowed Fund of £25,000 created in March 2019 would be worth £31,750 as at March 2022.** During that time it would have also generated **£4,000 for grants to local causes**. Of course, past performance is not an indicator of future results.

Endowed Funds are a source of long-term sustainable grant funding for local causes. After 15 years the value of grants made will have reached the value of the net donations, whilst the capital will have grown and will continue to generate income year in and year out.

Investment oversight

BCF's Finance & Investment Committee makes recommendations to the Trustee Board on the Foundation's financial and investment strategy and is charged with monitoring and regular reporting to the Board on investment performance.

> The key objective of the Foundation's current fundamental investment policy is to **"seek to achieve year-on-year an annual return of at least 4%, net of fees and averaged over three years, whilst preserving the Foundation's capital in real terms".**

The Foundation pursues a policy of mitigating investment risk attached to its funds, by ensuring a mixed diversified portfolio of cash, fixed interest securities and equity and property investments.

Find out more about how you can set up an Endowment Fund with us

Please complete this contact form:

Title: _____ **Full name:** _____

Company name: _____

Address: _____

_____

Email address: _____ **Telephone:** _____

☐ Stay updated on BCF's activities and progress. We will never share your details externally.

Alternatively, please email philanthropy@berkshirecf.org

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