Starting and Growing Your Endowment (Webinar Recording)

Which comes first: the needs of your organization or the desires of your donors? Is there a way to balance both?

Having proactive, constructive conversations with donors is essential to serving your mission while ensuring your endowment is honoring donor intent. In this webinar recording, you will hear from two nonprofit peers about how their organizations navigate sensitive conversations around legacy planning and donor engagement. Also, listen in as we explore the legal constructs surrounding donations.

Moderated by CAPTRUST Director of Endowments & Foundations Heather Shanahan, this webinar recording we explore:

- the importance of good governance, including having a well-drafted gift acceptance policy and naming policy;
- when you might want to consider forming a separate foundation to house your endowment;
- what makes a good investment policy statement;
- best practices for stewarding donors;
- and the critical roles board members play when growing an endowment.

To download a copy of the transcript, click here.

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