



Mona Foundation

Endowment

A proven investment in our future



Educate.
Empower.
Transform.

Endowed gifts are essential to the future growth, quality of education and empowerment of thousands of students that Mona supports globally.



Invest in Mona's Future with an Endowed Gift



Like all gifts that benefit Mona Foundation, endowed gifts contribute to high quality education, girls empowerment, and community transformation initiatives. Endowments are particularly powerful because they deliver a dependable, perpetual source of funding. Your gift to establish an endowment is an investment in the future—one that makes a real difference in the lives of the thousands of students we support by enhancing Mona Foundation's ability to sustain its life-saving, life-changing, and transformative mission.



Endowed gifts ensure
Mona's sustained service
to the most vulnerable for
generations to come.



What is an Endowment?

The Mona Foundation's Endowment Fund is composed of restricted funds established by donors in support of Mona's overall mission, or for specific purposes, such as named scholarships or in memoriam. Endowed funds are unique in that the total amount of the gift is invested. Each year, once the full endowment goal of \$5 million is realized, a percentage of the endowment's 36-month rolling average is distributed to benefit the Mona Foundation's programs. The rest is reinvested to ensure growth, maintaining the fund's future spending power. In this respect, an endowment is intended to be a perpetual gift. Considered a measure of an institution's long-term strength, endowments are essential if Mona is to remain a leading nonprofit. An endowed fund can also be established through an estate or planned gift, and is a great way to link your legacy with Mona's future.

With an endowed gift that supports the education of students in need, you leave a legacy that will change lives for the better in perpetuity.



Why Should I Make an Endowed Gift?

Education is the key to eliminating gender inequality, reducing poverty, creating a sustainable planet, preventing needless deaths and illness, and fostering peace. In our knowledge economy, education is the currency by which nations maintain economic competitiveness and global prosperity.

Your Mona Foundation endowment provides a permanent funding source that will support the education and empowerment of students in need for generations to come. Your endowment also ensures Mona's ability to recruit and retain exceptional talent, and provides critical funding to support our partner organizations globally.

The Mona Foundation Endowment Fund of \$1 million contributed by its Board members and donors has steadily grown over the past three years. Endowed contributions towards our goal of \$5 million from loyal donors and friends will help Mona Foundation realize its mission to alleviate global poverty and build more just and prosperous communities for all.



Benefit to the Mona Foundation

An endowed gift is made with the intention to preserve the principal value in perpetuity. Because of their permanence, endowments are among the most advantageous sources of funding for the Mona Foundation. Like all nonprofits, Mona Foundation is subject to the volatility of the economy. The Foundation, and our critical services, however, must endure despite market ebbs and flows.

Endowments help ensure sustained services to our most vulnerable students even if other funding sources become less reliable. Consistent funding provides our partner organizations the assurance they need to sustain their vital services without interruption. Endowments may be established to fund student scholarships, girls empowerment initiatives, infrastructure expansion to scale access, as well as areas of highest priority across our portfolio.

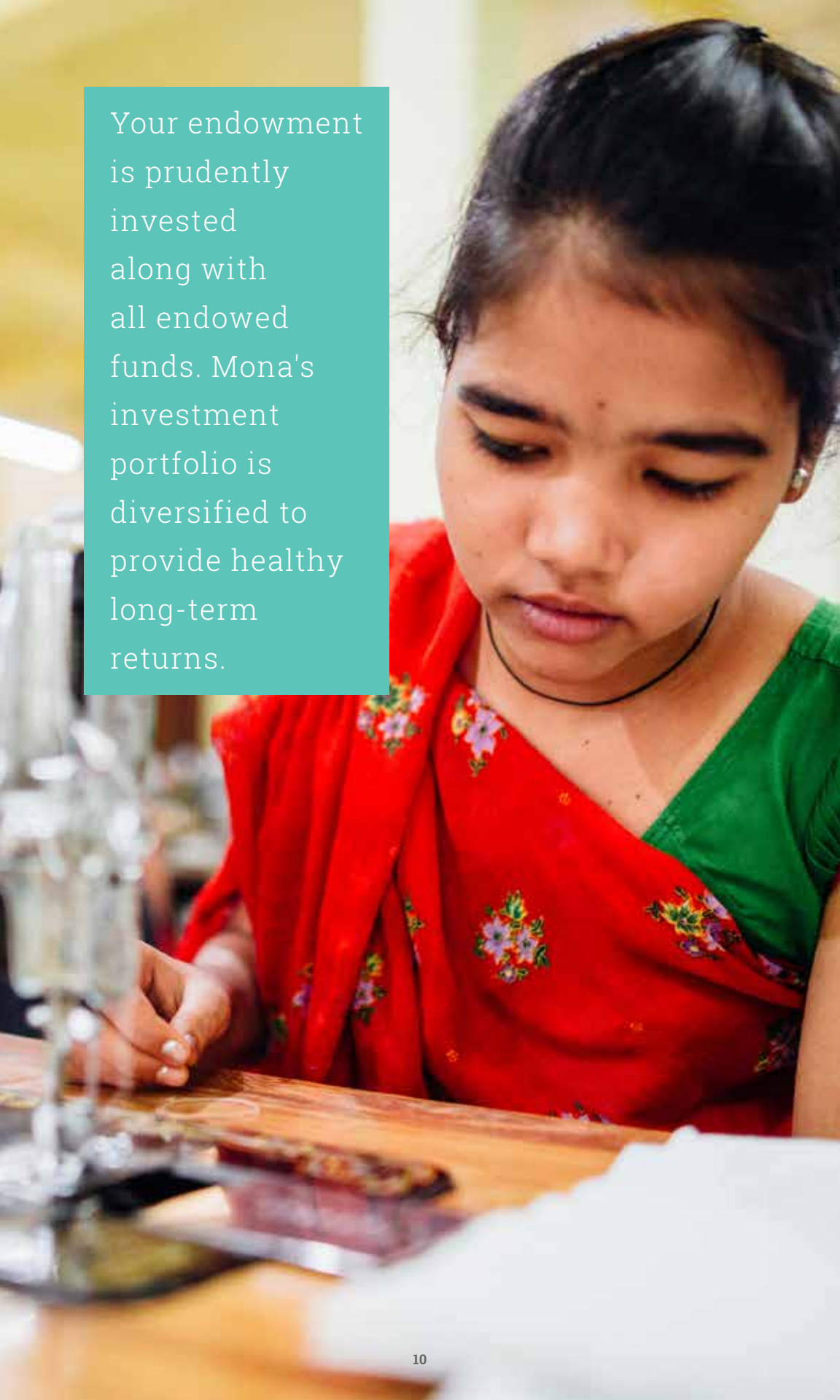
Benefit to you

In establishing an endowment with the Mona Foundation you have the power to choose how your investment will support the Foundation. The perpetuity of your endowed gift will help Mona Foundation sustain support in the area of your choosing, and you will feel satisfaction in knowing that you have invested in something you care deeply about. Through your endowment, you may also build a stronger connection with the students and the programs that benefit from your generosity. Endowments are an excellent way to honor someone special or to memorialize a loved one. Your family, friends and colleagues may choose to support the endowed fund you created and named because they know how special it is to you. Your family will enjoy a long relationship with Mona Foundation built around support for something you value.



Creating an endowment is a simple and meaningful way to honor or memorialize the ones you love.

Your endowment is prudently invested along with all endowed funds. Mona's investment portfolio is diversified to provide healthy long-term returns.



How Does an Endowment Work?

Establishing an endowed fund at Mona Foundation is easy. The board president or treasurer will guide you through the process and discuss options that fit your situation. The procedure for endowing a fund is as follows:

- With a minimum gift of \$15,000, you can establish an endowment to benefit Mona Foundation's critical mission of educating and empowering students in need. Options are available to allow you to reach the \$15,000 minimum over a period of time up to three years.
- An official Endowment Agreement between the donor and Mona documents the use and purpose of the endowed gift. Your endowment will be used exclusively for the purpose outlined in the Agreement. Endowed gifts are acknowledged in our Annual Impact Report.
- Your endowment is prudently invested based on Board-approved investment policies, along with all endowed funds at the Mona Foundation. The Foundation's investment portfolio is diversified to provide healthy long-term returns while minimizing losses during market downturns.
- Each year, once we have reached our goal of \$5 million, a percentage of your endowed fund's 36-month rolling average value is distributed to benefit Mona's supported programs as designated in the Agreement.
- Investment growth beyond distribution to Mona's supported programs is added to the principal, protecting the fund against inflation and market fluctuations. If the portfolio appreciation in the most recent year is less than the 36-month rolling average, it may reduce the principal.

A young girl with long dark hair, wearing a white school uniform and a white bow, is running and laughing joyfully. She is in the foreground, slightly out of focus. In the background, there is a two-story school building with white walls and green trim. Other students in school uniforms are visible in the background, some standing and some sitting on the ground. The scene is outdoors, and the lighting suggests it is daytime.

Your endowment continues in
perpetuity, providing permanent
income for Mona scholarships.

An Endowment Example

An individual or couple works with Mona's president or treasurer to create an endowment to support scholarships at Mona Foundation with a gift of \$100,000.

The gift is invested along with funds in Mona's endowment pool. These funds are invested based on board-approved investment policy and are kept intact until the endowment fund reaches \$5 million, assumed in this example to be the current year.

In the three years prior to the achievement of a pool value of \$5 million, the fund experiences annual investment appreciation of 3%, 5% and 7% during the most recent year. Based on the 36-month rolling average basis, the contribution from the endowment pool to Mona Foundation programs following the most recent year would be 5% (the average of the previous three years).

For the individual or couple, \$100,000 invested realized 7% growth in the most recent year. With 5% provided to programs, this would yield a net increase to their principal value of 2%. The new invested balance following the most recent year would now be \$102,000.

This cycle continues in perpetuity, providing permanent income for Mona scholarships.

Endowment Naming Opportunities



Each option may be treated as *unrestricted* to serve Mona’s overall mission, or specifically *designated* to serve a particular purpose, e.g. scholarship. Each option may also be named, including to honor or memorialize a loved one, and pledged over three years.

| Naming Opportunity Named at donor's discretion | Minimum Gift Amount Outright gift or 3-year pledge |
|---|---|
| Partner | \$250,000 |
| Change Maker | \$100,000 |
| Advocate | \$50,000 |
| Champion | \$25,000 |
| Benefactor | \$15,000 |

How do I Get Started?

Congratulations on your decision to create an endowment. Once you contact us, Mona's president or treasurer will work closely with you to define the features of your endowment to meet both your wishes and the needs of the Foundation.

Contact us at **425-210-8720** or **endowment@monafoundation.org**.

Income Tax Deduction: Gifts to the Mona Foundation, whether outright or in trust, may qualify for the maximum income tax deduction allowed for charitable contributions. The Foundation recommends that you consult with your attorney or tax advisor to determine the best form of charitable giving for your individual situation. The federal tax identification number for Mona Foundation is 91-1968512

A life changed by Mona



Preeti Kashyap, a 24-year-old mother of four, came to Study Hall Education Foundation (SHEF) almost three years ago to enroll her daughters at Prerna School. At the age of eight, Preeti started working with her mother as domestic help while looking after her siblings and her home. She was forced into marriage to a 30-year-old man when she was only 11, and had her first child at age 13.

By the time Preeti was 19, both her parents and her in-laws had passed away. The same year, her husband died of liver failure due to alcohol abuse. Determined to give her daughters a good future, Preeti worked in five houses to make ends meet and to send her daughters to school. When she came to Prerna to enroll her 11-year-old daughter, Rakhee Panjwani, principal of Prerna, asked Preeti to enroll, as well as her two other daughters. Her four-year-old son will be enrolled later when he turns six.

Preeti is now studying in an accelerated learning program while working part time in SHEF's outreach office. The SHEF staff helps with her younger son when Preeti attends classes.

Educate a child.

Change a world.

Join us.



Educate. Empower. Transform.

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