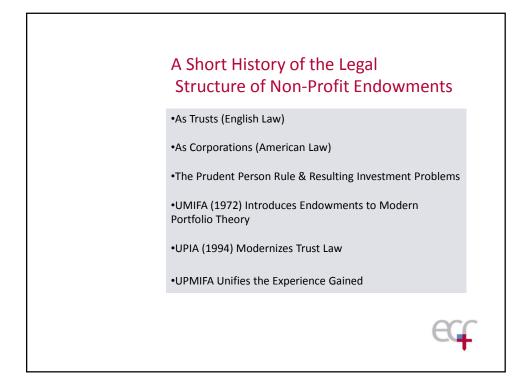
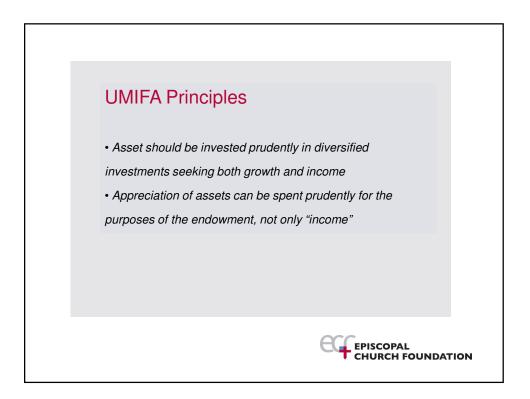
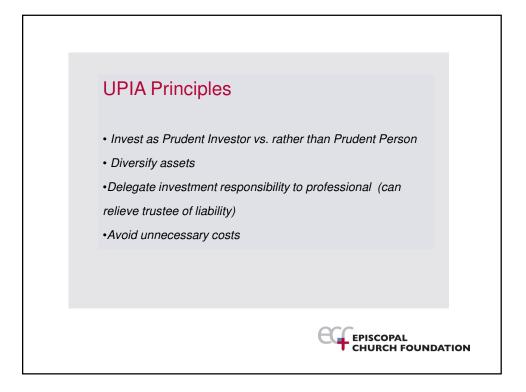
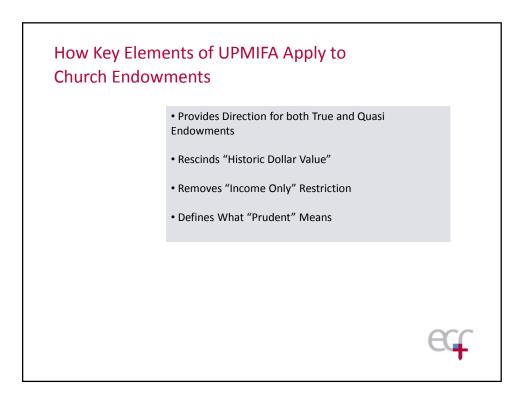


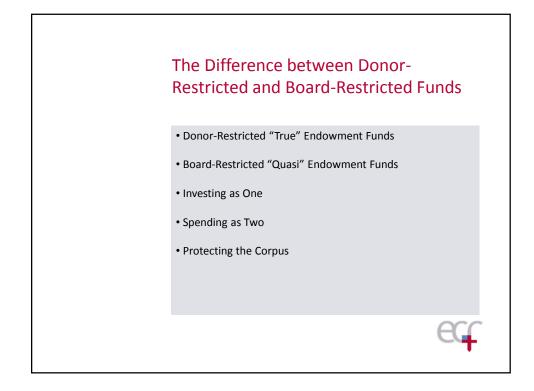
What is the Episcopal Church Foundation (ECF)? **Overview:** • Independent and lay-led foundation • ECF's mission is to strengthen the leadership and financial capabilities of Episcopal congregations, dioceses, and other institutions • ECF carries out this mission through a wide array of programs including... **Financial Resources** Leadership Resources ECF Vital Practices (ecfvp.org) **Capital Campaigns** ٠ Vestry Resource Guide • Planned Giving ٠ • Fellowship Partners Program Endowment Management ٠ ٠ Educational Events • **Educational Events** Vital Teams •

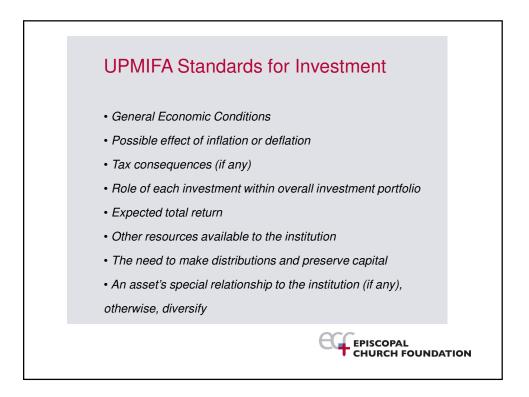


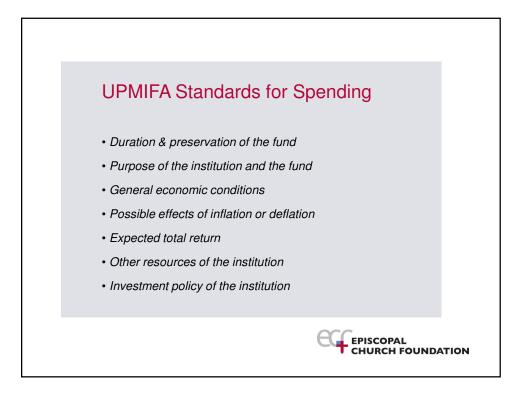




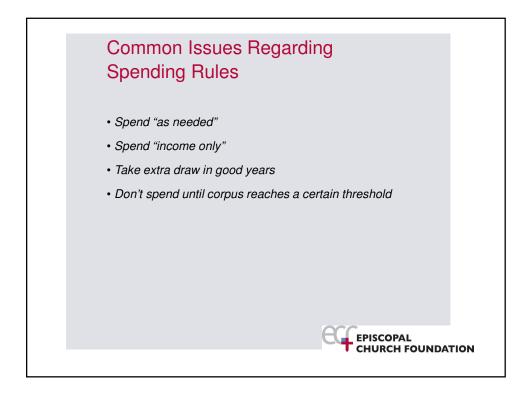




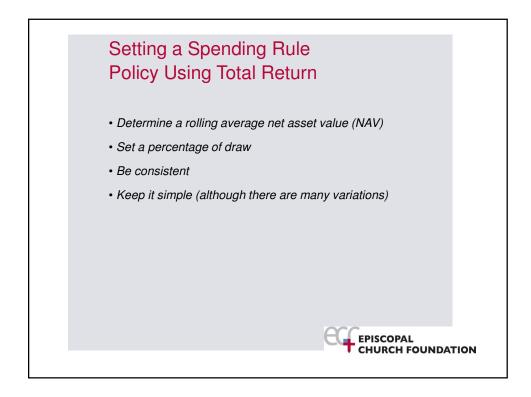










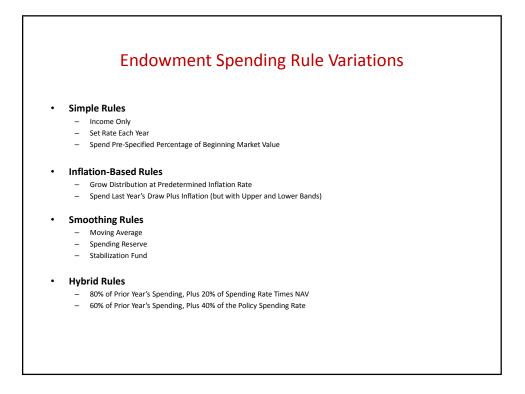


St. Swithin	's, Swam	npland –	 Total Ret 	urn Ca	alculation
٦	Three-Year A	verage & An	inual Draw Per	centage	
General Endowment Draw	/ for 2010				
12/31/2007	12/31/2008	12/31/2009	3-Year Average	4% draw	<u>3% draw</u>
199,276.10	132,274.14	164,043.76	165,198,00	6,607,92	4,955.94
General Endowment Draw	/ for 2011				
12/31/2008	<u>12/31/2009</u>	12/31/2010	3-Year Average	4% draw	<u>3% draw</u>
132,274,14	164,043.76	186,951.92	161,089.94	6,443.59	4,832.69
General Endowment Draw	for 2012				
<u>12/31/2009</u>	<u>12/31/2010</u>	<u>12/31/2011</u>	3-Year Average	4% draw	<u>3% draw</u>
164,043.76	186,951.92	177,421.89	176,139.19	7,045.56	5,284.17
General Endowment Draw	for 2013				
<u>12/31/2010</u>	<u>12/31/2011</u>	<u>12/31/2012</u>	3-Year Average	4% draw	<u>3% draw</u>
186,126.73	177,421.89	220,248.28	194,598.89	7,783.95	5,837.96
General Endowment Draw	for 2014				
<u>12/31/2011</u>	<u>12/31/2012</u>	<u>12/31/2013</u>	3-Year Average	4% draw	<u>3% draw</u>
177,421.89	220,348.28	268,088.57	221,952.91	8,878.81	6,658.58

	Spending F	Rule Calculation	ו	
Here is a simple calcula implications of sper		lp endowment boar	ds think through the	
Spending Rate	5%	4%	3%	
Inflation	2%	2%	2%	
• Fees	<u>1%</u>	<u>1%</u>	<u>1%</u>	
	8%	7%	6%	



CONS		pected Retu	1115
Expected returns based on I	ong-range asse	t class forecasts as	of December 2014:
70/30 Equities/Fix	ed Income – 6.:	18% annualized ove	er three vears *
		32% annualized ove	
Spending Rate	5.00%	4.00%	3.00%
Fees	1.00%	1.00%	1.00%
Inflation	<u>2.00%</u>	<u>2.00%</u>	<u>2.00%</u>
	8.00%	7.00%	6.00%
Expected Return on 70/30	7 <u>.00%</u>	7 <u>.00%</u>	7 <u>.00%</u>
Difference	(1.00%)	0%	1.00%





- Basics of Planned Giving for Parish Leaders
- Basics of Endowment Management for Parish Leaders
- Prospective Donors of Planned Gifts
- Basics of a Capital Campaign
- Annual Stewardship
- Vestry Leadership 101

For links to recordings visit: www.ecfvp.org



