



# Frequently Asked Questions

## WHAT ARE THE TOP PRIORITIES OF RAISE WE OUR VOICES?

*Raise We Our Voices: For Access and Excellence* will support the people of St. Anne’s-Belfield School by growing the endowment and increasing annual resources to the operating budget specifically targeted for financial aid and teaching excellence. We seek to raise \$10 million for the following initiatives:

**Access** so that talented and deserving students can attend St. Anne’s-Belfield School, regardless of their ability to afford the full tuition, and so that our School can move closer to its aspirational vision for total “need-blind” admission.

**Teaching Excellence** so that St. Anne’s-Belfield School can attract, retain, and develop the very best teachers and provide them with the resources they need to excel and innovate.

Through this initiative, we also hope to celebrate and share the many voices of our community through increased engagement, connection, dialogue and storytelling.

## WHY NOW, AND WHY THESE PRIORITIES?

Our people are the heart of our School. We need to ensure that every qualified student has access to our education and ensure teaching excellence and innovation for the future. We must act now. In this changing and multi-cultural world, it is imperative that we create a diverse and vibrant community here at St. Anne’s-Belfield School, a place where students of different gifts and voices can exchange ideas, learn, and grow. To lead and develop these future leaders, we must attract the very best teachers, and once they are here, we must provide them with the resources they need to succeed, from professional development opportunities to new classroom technologies and creative learning spaces.

At St. Anne’s-Belfield School, we aspire to create an enriching academic and community experience that inspires both teachers and students on a daily basis. We are not only teaching for today. We are inspiring and empowering leaders of tomorrow.

Though tuition supports much of our operating expenses, it alone does not address all of our programs. Our Annual Fund helps to make up the difference and supports so much more than what typical schools in a small community can provide, from athletics to arts, yet it too falls far short of what we need to ensure support for scholarships, financial aid and teacher salaries for the long term. As the largest independent school in the smallest market nationally, we have a unique and challenging model to sustain. Tuition increases at present levels are not a viable solution in our marketplace and given our enrollment aspirations. Our relatively large enrollment brings great benefit to our students and community, yet requires alternative and sustainable funding. This is why we created *Raise We Our Voices* to be a focused effort to ensure endowment growth and operating funds for these paramount priorities for generations to come.

## WHERE SHOULD I DIRECT MY GIFT?

Wherever you give and whatever the size of your gift, you will be making a difference - so, thank you! Donors are encouraged to consider directing their campaign gift to a fund in one of these categories:

**Area of Greatest Need**  
(at the School’s discretion)

### Access Funds

Financial Aid Endowment Funds

Financial Aid Current Use Funds

### Teaching Excellence Funds

Teaching Excellence Endowment Funds

Teaching Excellence Current Use Funds

## CAN PLEDGES BE MADE OVER A PERIOD OF TIME?

Yes, pledges can be made over a period of up to five years.

## ARE THERE ANY NAMING OPPORTUNITIES ASSOCIATED WITH THIS CAMPAIGN?

Yes, there are naming opportunities available for gifts of \$10,000 and above. All donors will be recognized in our annual honor rolls and on the School’s website.

### WHY IS THE GOAL \$10 MILLION?

In 2014, the Board of Trustees outlined a ten year financial model that projected approximately \$1.3 million needed in new current-use resources to be used to augment operational expenses, such as financial aid and teacher salaries. By raising these funds through philanthropic sources, we can mitigate against the need for substantial increases to the Annual Fund and tuition and protect the principal of the unrestricted endowment.

### ARE THERE WAYS TO SUPPORT THIS INITIATIVE AND THE SCHOOL IN ADDITION TO GIVING?

Yes! By staying engaged, you perpetuate, extend, and bolster St. Anne's-Belfield School's impact. You become a part of a strong network of Saints around the world that supports personal and professional success in current and future alumni. Stay engaged by doing the following:

- + Help the School to attract talented students and teachers. Contact the admission office, the division heads, or the associate head for academics with referrals.
- + Volunteer! We are always looking for parents and alumni to get involved so that we can create a strong and vibrant school community. Check out volunteer opportunities at [stab.org/community/getting-involved](http://stab.org/community/getting-involved).
- + Connect with our students by participating as a guest speaker.
- + Host an intern at your company.
- + Attend various St. Anne's-Belfield School events throughout the year. If you are an alumnus, please consider hosting or supporting local and regional alumni events. Contact the Alumni Office if you are interested.
- + Stay in touch with us on social media. If you are an alumnus, please download the Alumni App!
- + Share your story via our website.

### I ALREADY SUPPORT OTHER INSTITUTIONS AND NONPROFITS THROUGH CHARITABLE GIVING. WHY SHOULD I GIVE TO ST. ANNE'S-BELFIELD SCHOOL?

The educational experience at St. Anne's-Belfield will have a lasting impact. Nothing compares to the power of a good education, whether measured in the acquisition of skills, knowledge, values, or friendships.

As a School we are holding firm to our traditions, while boldly adopting new and innovative programs and we are doing big things in our community, from hosting the first-ever Hackathon in the area for high school students to bringing world-class speakers to our backyard for the *Inspiration Speaks* lecture series.

While we are proud of all that we are doing, we can do so much more to meet the needs of deserving students who want to attend St. Anne's-Belfield School, and we can be more competitive when it comes to attracting and retaining the very best teachers. We are eager to lead a new era of educational excellence.

### THANK YOU FOR YOUR SUPPORT!

### *Can't find the answer you need?*

Contact Bruce Cauthen, director of donor relations and annual giving, at [bcauthen@stab.org](mailto:bcauthen@stab.org), or Warren Buford, associate head of school for advancement, at [wbuford@stab.org](mailto:wbuford@stab.org).



## Access



For we aim to create a community that is both quantitatively diverse and qualitatively inclusive: warmly welcoming people from all backgrounds to our doors, recognizing and celebrating all of the differences in this room and in our local and global community, and preparing you for the diverse, multicultural, shrinking world in which you will live and which you will lead.”

*2015 Convocation Speech  
by David S. Lourie*



**39%**  
OF STUDENTS  
RECEIVE FINANCIAL  
AID AT  
ST. ANNE'S-  
BELFIELD SCHOOL

Compared to a  
**MEDIAN OF 23%** for  
all National Association of  
Independent Schools.

### WE BELIEVE THAT EVERY TALENTED AND DESERVING STUDENT INTERESTED IN JOINING OUR COMMUNITY SHOULD BE ABLE TO ATTEND REGARDLESS OF THEIR FAMILY'S FINANCIAL MEANS.

We need your help to ensure that St. Anne's-Belfield School can open its doors to students of all backgrounds and talents now and into the future. Such an investment is necessary to achieve present enrollment goals, become more financially sustainable, and achieve programmatic excellence. Our ability to continue to offer the breadth of programs depends on the critical mass of talented, motivated students who participate in our robust orchestral, theater and arts programs, over 45 athletics teams, myriad extracurricular activities and most importantly contribute to the rich academic experience.

At present the School awards over \$4.6 million in financial aid to nearly 40% of its students. Average grant size is around \$12,000 in grades K-8 and over \$14,000 in grades 9-12. Financial assistance is awarded to a wide range of families. Students for whom the School would not be possible without financial aid include a choir leader who speaks of being challenged to think broadly and get out of his comfort zone; a transfer student from a local school who talks about the profound impact of her recent Intensive Course on Race and Gender and her ambition that the School introduce a broader curriculum around these topics; and the student government leader whose ambitions are shaped by her pursuit of independent studies in religion and art.

Attracting and enrolling students regardless of their ability to afford full tuition is a defining characteristic of our mission, an important element in our financial planning, and most importantly, a means to achieving the kind of 21st century learning environment that our students and teachers deserve and need for thriving in the future. It is a commitment that we intend to strengthen.

### WAYS TO GIVE

#### *Current Use Funds*

We have a number of funds that support specific scholarships and financial aid programs right now. You may contribute to these already existing funds or establish a new fund. Some examples include: the **Financial Aid Fund**, **Centennial Scholarship**, and **Brownfield Fund for International Studies**.

#### *Endowments*

Endowments support St. Anne's-Belfield School in perpetuity. We have a number of funds whose earnings support need-based scholarships, financial aid, and opportunities for students.

More information about financial aid and scholarship funds can be found at [stab.org/endowmentgiving](http://stab.org/endowmentgiving).

### *Planned Giving - An Enduring Impact*

Donors may also support Student Access by remembering St. Anne's-Belfield School in their estate plans or by creating charitable giving vehicles that provide income in perpetuity. Planned gifts will be valued and documented as part of *Raise We Our Voices*. All planned giving donors are recognized as members of The 1910 Society. Learn more about planned giving options on our website at [stab.org/plannedgiving](http://stab.org/plannedgiving).

- |  |   |
|--|---|
| + Class of 1978 Endowment  | + Gilder Minority Scholarship Fund  |
| + Class of 1954 Endowment<br>(also known as the <i>Inasmuch Fund</i> ) | + Judge Harold H. Purcell<br>Scholarship                                    |
| + Class of 2004 Endowment  | + The Loper/Davis/Munn Fund   |
| + The Alexander Hamilton Bishop III<br>Memorial Scholarship            | + Murray General Scholarship<br>Endowment Fund                              |
| + The David E. Bard Endowed<br>Scholarship                             | + The Phyllis Culbertson Draper<br>Endowment                                |
| + Doug Tarring Endowed<br>Scholarship Fund                             | + The Strickler Endowment Fund  |
| + The Edward and Janet Miller<br>Scholarship Fund                      | + Susanne Smith Memorial Fund   |
| + The Endowed Financial Aid Fund                                       | + William S. Blackford Golf<br>Scholarship Endowment Fund                   |
| + Erksine Wilde Fund   | + The Frank Stinchfield<br>Experiential Environmental<br>Learning Endowment |
| + Faculty Staff Endowed Scholarship                                    |   |

### *Learn More!*

If you are interested in learning more about supporting Student Access, please contact Bruce Cauthen, director of donor relations and annual giving, at

**[bcauthen@stab.org](mailto:bcauthen@stab.org)**

or Warren Buford, associate head of school for advancement, at

**[wbuford@stab.org](mailto:wbuford@stab.org)**

You may also learn more by visiting our website at [stab.org/raiseweourvoices](http://stab.org/raiseweourvoices).

## *Forever a Saint*

Endowed funds ensure that we can provide access to students for many years to come, and they are also a great way to honor and remember loved ones and leave a legacy at St. Anne's-Belfield School. The proceeds may support students of any background and talent, depending on what is meaningful to you. You may support an existing endowment with a gift of any size or establish a new endowed fund with a minimum of \$25,000. Below is a listing of endowment levels for new scholarship funds:

### FULL TUITION NAMED SCHOLARSHIP FUND: **\$500,000**

This fund is for a named scholarship in honor or memory of an individual or family and the earnings will cover a full tuition at present value.

### PARTIAL TUITION NAMED SCHOLARSHIP FUND: **\$250,000**

This fund is for a named scholarship in honor or memory of an individual or family and the earnings will cover a partial tuition.

### NAMED FINANCIAL AID AWARD FUND: **\$100,000**

This fund is for a named financial aid award in honor or memory of an individual or family and the earnings will provide a partial award to a student.

### FINANCIAL AID FUND: **\$25,000 - \$50,000**

This fund supports the financial aid budget of the school. Endowment must be restricted to underwriting need-based financial aid for general distribution by the school.



# Teaching Excellence



Thank you to ALL of the teachers who invested their time and energy into making my time at St. Anne’s-Belfield not only successful but special (not to mention fun!). One thing is for certain, STAB teachers are a cut above the rest! I feel honored to have had them in my life.”

**Robin A. M. Bosek '04**

## OUR TEACHERS DO MORE THAN JUST TEACH. TEACHERS AT ST. ANNE’S-BELFIELD SCHOOL EXCEL IN THEIR CRAFT AND DARE TO INSPIRE.

They empower students. They serve as steadfast mentors for our students in the classroom and on the playing field, lead service projects and activities that embolden the voices of our students, cheer them on at musical performances and drama productions, and continuously develop their craft and breathe life to new and innovative programs. Our teachers go beyond because we are more than just a school. We are a community in which each child is known, nurtured and challenged to be their best.

With your support, we can ensure the sufficient resources needed to attract and retain the best teachers and provide professional development opportunities so that our faculty never stops growing. We can continue to provide new and innovative curricula, such as the new Computer Science Initiative, Upper School Intensives, Singapore Math and FAB Lab, to ensure that our students are ready to succeed in the 21st century. With your support, we can open a world of possibilities for our teachers and continue St. Anne’s-Belfield School’s legacy of pedagogical excellence.

## WAYS TO GIVE

### Current Use Funds

We have a number of funds that specifically support teachers and innovative curricula right now. You may contribute to one of these funds or create a new initiative in partnership with School leadership.

- + **Computer Science Initiative:** St. Anne’s-Belfield School is on the cutting edge of a national movement to bring computer science to K-12 students, developing design thinking, logical reasoning, and problem-solving skills. **Challenge Initiative: \$625,000 to be matched by 2019 (\$300K+ raised)**
- + **Singapore Math:** Our Singapore Math instruction in Kindergarten through sixth grade provides students with math study that goes beyond memorization of math facts.
- + **Fab Lab:** Fab Lab is our own version of Google’s ‘20% Time’. During weekly FAB Lab afternoons, teachers supplement curricular academics with the habits and skills of student-initiated learning. Children develop perseverance as they generate questions, solve problems, collaborate with peers, and delve into their natural curiosities and intellectual pursuits.
- + **Humanities Program:** The Humanities Program integrates English, history, and religion into a program emphasizing inquiry in these disciplines as well as in art, architecture, and philosophy.

“It’s clear to me that I am supported as a person, a teacher, and an artist at STAB. [I] have now participated in two professional development opportunities in my [first] two years at STAB. I look forward to these opportunities because there is so much more to learn.”

**– Alexis Parker,  
Upper School Art**

- + **Upper School Intensives:** These 3-week long classes in the Upper School are thoroughly immersive in a small-group setting, including forensic science, entrepreneurship, debate, logic, wildlife management, and race and gender studies.
- + **Teacher Professional Development:** The School's biannual Auction has raised funds that enable faculty members to innovate and grow. Through support of the previous two auctions, our teachers have earned advanced degrees, traveled internationally, and attended or presented at various workshops and training seminars.
- + **Learn to Learn Institute:** Learn to Learn is an innovative week long faculty professional development experience at St. Anne's-Belfield designed to bring teachers together to examine best practices and create new ones around seminal topics in education and pedagogical excellence.

### Endowments

Endowments are a great way to support St. Anne's-Belfield School in perpetuity. We have a number of funds that support teacher salaries and professional development and provide teachers with the resources they need to succeed, including the following:

- + **The Diana Edwards Smith Teaching Mastership**
- + **The Faculty Summer Development Program**
- + **Lossie N. Wilkinson Endowed Teacher Award**
- + **The Mary Welham Knopf Library Endowment Fund**
- + **Pamela Malone Fund**
- + **The Susan Smith Endowment for Faculty Professional Development and Enrichment**
- + **Endowed Teaching Excellence Fund**

### Planned Giving - an Enduring Impact

Donors may also support Teaching Excellence by remembering St. Anne's-Belfield School in their estate plans or by creating charitable giving vehicles that provide income in perpetuity. Planned gifts will be valued and documented as part of *Raise We Our Voices*. All planned giving donors are recognized as members of The 1910 Society. Learn more about planned giving options on our website at [stab.org/plannedgiving](http://stab.org/plannedgiving).

### Learn More!

If you are interested in learning more about making a planned gift, please contact Bruce Cauthen, director of donor relations and annual giving, at [bcauthen@stab.org](mailto:bcauthen@stab.org) or Warren Buford, associate head of school for advancement, at [wbuford@stab.org](mailto:wbuford@stab.org). You may also learn more by visiting our website at [stab.org/raiseyourvoices](http://stab.org/raiseyourvoices).

## Leave a Legacy; Honor a Teacher

Endowed funds ensure the highest standards for teaching excellence far into the future, and they are a meaningful way to honor and remember loved ones and beloved faculty members. The proceeds from these funds may underwrite salaries, support professional development opportunities, and provide needed resources for recipients. You may give to a previously established endowment fund at any level.

You may establish an endowed fund with a minimum gift of \$25,000, or you may name an endowment at any of the following levels:

- DISTINGUISHED OR HEAD OF SCHOOL CHAIR: **\$1,000,000+**
- FACULTY EXCELLENCE CHAIR: **\$500,000+**
- ACADEMIC POSITION OR PROFESSIONAL DEVELOPMENT FUND: **\$250,000+**
- ACADEMIC PROGRAM FUND: **\$100,000**
- FACULTY AWARDS: **\$25,000+**



## Planned Giving Overview

**FOR OVER 100 YEARS**, St. Anne's-Belfield School has fostered an educational community that nurtures the development of advanced skills, abilities, and knowledge; supports high personal aspirations; and develops exemplary, ethical, and engaged citizens who positively impact the world. From the School's beginning in 1910, meeting these goals has required the generous support of alumni, parents, and friends.

Planned gifts ensure the School's mission and vitality will continue long into the future. With The 1910 Society, the School's acknowledgment of these legacy gifts will be similarly long-lived.

### WHAT IS A PLANNED GIFT?

We all want to take care of what and who we love. We work hard to ensure that they have the resources they need to thrive. A planned gift is one designed to provide resources for the people and places that are meaningful to us after we are no longer there to support them. Working with your lawyer and financial advisor, you can specify that a part of your estate pass to the School after your death. Most planned gifts cost nothing during your lifetime. Planned gifts may also provide immediate income to you or your loved ones.

### PLANNED GIFTS MEET YOUR GOALS

#### *Bequests*

Include St. Anne's-Belfield School in your will, either for a specific sum or a percentage of your estate. You retain full use of your resources while you are living, knowing that whatever remains will provide a substantial gift that lasts beyond your lifetime. See your attorney to include the School in a new will, or in an existing will by means of a codicil.

#### *Life Income Gifts*

Your gift of property or cash can return an income to yourself or loved ones. Gift annuities and remainder trusts pay substantial income to those you name and garner an immediate and significant income tax deduction. Your life income gift using appreciated property will turn this asset into a major gift for the School and generous income for you, without capital gain tax.

#### *Retirement Accounts*

Retirement accounts are subject to heavy taxes when passed to your heirs. Giving these assets to the School or naming the School as a beneficiary can be a great alternative. The income and estate taxes saved through this type of gift actually may pay for most of the contribution.

#### *Insurance*

Many people own insurance policies purchased years ago for the benefit of children, spouses, or other dependents. These policies can serve a new purpose as a gift to the School. When you give a life insurance policy, you receive a charitable income tax deduction for the cash value. Alternatively, you may name the School as the beneficiary and reduce your estate for tax purposes.



Investing in the development of our teachers is truly an investment in the education of our students and therefore an investment not only in the future of the school but in the broader world.”

*Laura Robertson,  
Grade 7-12 Humanities Chair  
& Upper School Humanities  
Teacher*



Because I consider my education one of the greatest blessings of my life, planned giving to St. Anne's-Belfield School is an obvious way to pass it on to others.”

*Margaret Goodman '54*

## THE 1910 SOCIETY

St. Anne's-Belfield School established The 1910 Society in 2007 in recognition of those who seek to ensure the long-term health and well-being of the School by including it in their estate plans.

Members of The 1910 Society provide vital resources to help the School realize its goals. The members of The 1910 Society—alumni, parents, and friends—understand that their support will have an enduring impact on the School they loved so much.

If you have already included St. Anne's-Belfield School in your plans, please accept our thanks and notify us so that we can recognize you as a member of The 1910 Society.

Learn more at [stab.org/1910society](http://stab.org/1910society).

Through the *Raise We Our Voices* initiative, we aim to triple membership in The 1910 Society.

## OTHER TYPES OF GIVING

A TOD (Transfer on Death) deed or bank account transfers title to a designated beneficiary like the School effective with the owner's death. It passes property directly, without adding to the cost and delay of probate. Family foundations and donor-advised funds also may provide benefits to donors interested in maximizing impact to the School and/or managing tax burdens.

## ESTABLISHING THE PURPOSE OF YOUR GIFT

Many donors choose not to restrict the purpose of their planned gift, allowing the School to use the funds wherever they are most needed. Alternatively, donors may designate that their gift be spent for specific purpose, and may do so for the *Raise We Our Voices* initiative.

Donors may designate gifts to be held as part of the School's endowment. Endowed funds ensure that the School will prosper in perpetuity, by yielding an annual "draw" in accordance with the School's endowment spending policy.

Donors may further restrict the use of this annual endowment "draw" by agreement with the School. The School currently has several endowed funds to support specific needs, and gifts over \$25,000 entitle the donor to establish a named, specific fund. Please contact the School to discuss any gift designated to endowment and restricted use. You can learn more about endowment giving at [stab.org/endowmentgiving](http://stab.org/endowmentgiving).

## FOR MORE INFORMATION

The Development and Alumni Relations Office at St. Anne's-Belfield School looks forward to working with you and your advisors to help you develop a gift plan that best achieves your philanthropic goals.

To learn more about making a planned gift, please contact Bruce Cauthen, director of donor relations and annual giving, at [bcauthen@stab.org](mailto:bcauthen@stab.org) or Warren Buford, associate head of school for advancement, at [wbuford@stab.org](mailto:wbuford@stab.org). You may also visit the Planned Giving page on the School's website at [stab.org/plannedgiving](http://stab.org/plannedgiving).

*Any information concerning giving options or their tax benefits as provided by St. Anne's-Belfield School is of a general educational nature only and does not constitute or substitute for legal advice. Please seek professional legal advice regarding how any gift to the School might affect your personal situation. All planned gifts are subject to the Board of Trustees Planned Giving Policy (2015).*



## Endowments - Create a Legacy Forever

### ENDOWED FUNDS ARE THE SCHOOL'S "SAVINGS ACCOUNT," ENSURING THAT THE SCHOOL WILL PROSPER IN PERPETUITY.

Donors making gifts to these funds specify that their contributions will be invested and that only the interest earnings from their investments will be spent.

As of June 30, 2015, the School's overall endowment carried a market value of \$41.5 million. Almost \$35 million is in an unrestricted investment pool, which provides earnings the Board of Trustees and the School can use to meet current strategic initiatives, including capital improvements, faculty professional development, and creation of new programs.

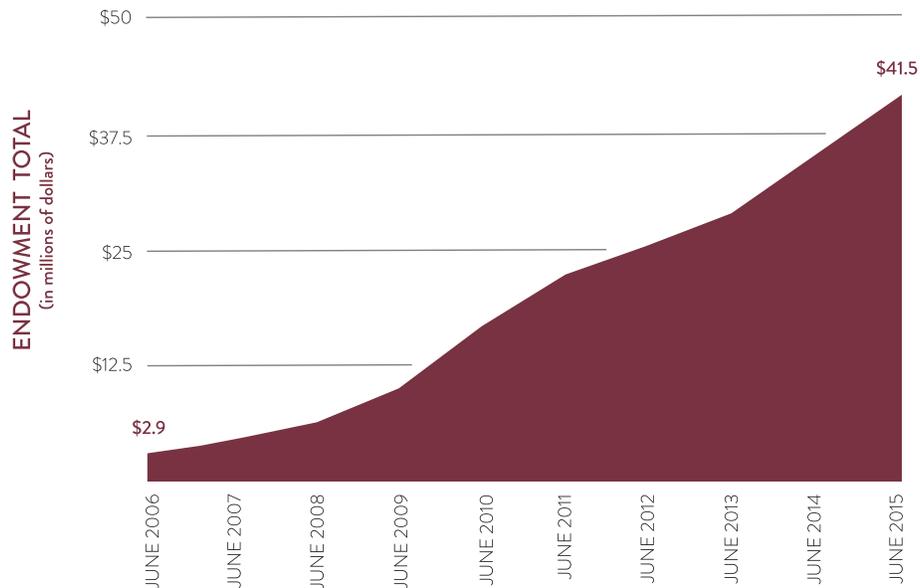
The School also has temporarily and permanently restricted endowed funds which are valued at almost \$6.2 million. These funds generate over \$300,000 each year. Earned interest from the School's restricted endowments is used to support broad areas including financial aid, teacher excellence, capital improvements, and general operations, among others, or is invested back into the principal of the endowment.

### ENDOWMENT GUIDELINES

Endowments are established legally as independent funds, and their financial returns are audited each year. As a result, the School has established policies to help avoid creating funds that incur costs while yielding minimal benefit.

At present, a named endowment fund may be created with a minimum of \$25,000. Once this threshold is reached, a portion of the fund's earnings (approximately 5%; the actual amount is established each year by the School's investments committee and is based on market performance) will be allocated to achieve the fund's goal. Much of the School's invested funds, whether unrestricted board designated or permanently restricted endowment funds, are invested with Spider Management Company at the University of Richmond.

ST. ANNE'S-BELFIELD ENDOWMENT  
2006 - 2015



## ENDOWMENT FUNDS BY PURPOSE

### *Faculty Excellence*

- + The W. Alton Jones Foundation Endowment
- + Diana Edwards Smith Teaching Mastership
- + Faculty Summer Development Program Endowment
- + Lossie N. Wilkinson Endowed Teacher Award
- + Pamela Malone Fund
- + Susan Smith Endowment for Professional Development & Enrichment

### *General Financial Aid*

- + Erskine Wilde Fund
- + Susanne Smith Memorial Fund
- + Class of 1954 Endowment (*Inasmuch Fund*)
- + Class of 1978 Scholarship Fund
- + Class of 2004 Endowment
- + Edward and Janet Miller Scholarship Fund
- + Endowed Financial Aid Fund
- + Murray General Scholarship Endowment Fund
- + Phyllis Culbertson Draper Endowment
- + Strickler Endowment Fund
- + Faculty Staff Endowed Scholarship

### *Project & Program Endowments*

- + David M. van Roijen Speaker Fund
- + George Conway Lectureship
- + Camp Corwith Fund
- + Doug Wardle Endowed Fund (Doug's Fund)
- + Mary Welham Knopf Library Endowment Fund
- + History Department Chair Endowment
- + Doug Tarring Boys' Lacrosse Program Endowment
- + Mary Blake Endowment for Girls' Lacrosse

### *Specific Scholarships*

- + Alexander Hamilton Bishop III Memorial Scholarship
- + David E. Bard Endowed Scholarship
- + Doug Tarring Endowed Scholarship Fund
- + Gilder Minority Scholarship
- + Judge Harold H. Purcell Scholarship
- + Loper/David/Munn Fund
- + William S. Blackford Golf Scholarship Endowment Fund
- + The Frank Stinchfield Experiential Environmental Learning Endowment

### WHAT ELSE?

- + Endowment gifts can be designated for any purpose that aligns with the School's mission.
- + Endowment funds are the perfect way to honor your family, a special teacher, a loved one, or any person or entity of your choice.
- + Endowment gifts are invested "forever," and create a lasting legacy that supports St. Anne's-Belfield School in perpetuity.
- + Endowment funds can also be paid with a multi-year pledge of no more than five years.
- + The School will provide regular reports to donors on the performance of the fund.
- + Once you create an endowment fund, it becomes a permanent part of the St. Anne's-Belfield School history and tradition.

### *For More Information*

If you are interested in learning more about the School's current endowments or about establishing an endowed fund, please contact Warren Buford, associate head of school for advancement, at [wbuford@stab.org](mailto:wbuford@stab.org) or (434) 296-5106. You may also learn more by visiting [stab.org/support](http://stab.org/support).



# St. Anne's-Belfield School Letter of Intent

## PERSONAL INFORMATION

This agreement is entered upon between St. Anne's-Belfield School in Charlottesville, VA and:

Name(s) \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_

State \_\_\_\_\_ Zipcode \_\_\_\_\_ Email \_\_\_\_\_ Phone \_\_\_\_\_

## PAYMENT OPTIONS

I/We hereby commit \$ \_\_\_\_\_ to *Raise We Our Voices*.

I have included \$ \_\_\_\_\_ herewith. All of the remaining amount of the pledge will be paid in the following manner:

\$ \_\_\_\_\_ Cash  
Please make checks payable to St. Anne's-Belfield School or make a secure gift online at [stab.org/give](http://stab.org/give). To learn about other ways to give, visit [stab.org/support/how-to-give](http://stab.org/support/how-to-give).

Securities \_\_\_\_\_

Other Gift Please provide a brief description.  
\_\_\_\_\_  
If a deferred gift, this pledge is binding upon My/Our estate.

The balance to be paid in \_\_\_\_\_ (#) of equal installments, beginning \_\_\_\_\_ (date) and ending \_\_\_\_\_ (date). Contributions may be paid over five years.

**You can also make a gift online at [stab.org/support/give](http://stab.org/support/give)**

## GIFT INFORMATION

**1)** Purpose of Gift (check one)

- Student Access
- Teaching Excellence
- Either (Area of Greatest Need)

**2)** Type of Fund (check one)

- At the School's Discretion (please skip to next question)
- Current Use (see reverse side for more information)
- Endowed (see reverse side for more information)

**3)** Please direct my gift to the following

Restricted Fund: (check one)

- At the School's Discretion (Area of Greatest Need)
- Current Established Fund (see reverse side)

New Fund Please contact the Office of Development about establishing a new current use or endowed fund.

If you do not make a designation, we will contact you about the intent of your gift.

## ADDITIONAL INSTRUCTIONS

In publication and donor honor rolls, I wish for my/our name to read as follows:

Name \_\_\_\_\_

I desire my gift to be anonymous.  I do not wish to be listed in St. Anne's-Belfield School publications and donor honor rolls.

## SIGNATURE

This pledge shall be a contract enforceable at law and legally binding on my estate and the executors and administrators thereof. Any portion of the pledge which is not paid during my lifetime, or at my death pursuant to a beneficiary designation or from a revocable trust created by me, shall be a debt due from me and payable at the time of my death from my estate.

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

Donor Signature \_\_\_\_\_ Date \_\_\_\_\_

*Please continue on reverse side*

## ADDITIONAL INFORMATION

- **Current Use Fund:** Funds are used on an as-needed / annual basis without the goal of preserving a minimum dollar level.
- **Endowment Fund:** An endowment is a permanent fund whose principal remains intact and is invested to generate income that in turn supports programs and activities in perpetuity.

## LIST OF RESTRICTED FUNDS

	ACCESS	EXCELLENCE
<b>CURRENT USE</b>	Centennial Scholarship Financial Aid Fund The Terry Brownfield International Fund	Computer Science Initiative Curricula & Other Learn to Learn Institute Singapore Math Program Teaching Excellence Fund Technology Fund
<b>ENDOWED</b>	The Alexander Hamilton Bishop III Memorial Scholarship Endowed Financial Aid Fund Erskine Wilde Fund Class of 1978 Endowment Class of 1954 Endowment Class of 2004 Endowment The David E. Bard Endowed Scholarship Doug Tarring Endowed Scholarship Fund Edward & Janet Miller Scholarship Fund The Frank Stinchfield Experiential Environmental Learning Endowment Faculty Staff Endowed Scholarship Gilder Minority Scholarship Fund Judge Harold H. Purcell Scholarship Fund The Loper/Davis/Munn Fund Murray General Scholarship Endowment The Phyllis Culbertson Draper Endowment The Strickler Endowment Fund Susanne Smith Memorial Fund William S. Blackford Golf Scholarship Endowment Fund	Diana Edwards Smith Teaching Mastership Endowed Teaching Excellence Fund Faculty Summer Development Program The Lossie N. Wilkinson Endowed Teacher Award Mary Welham Knopf Library Endowment Pamela Malone Fund Professional Development & Enrichment The Susan Smith Endowment for Faculty The W. Alton Jones Foundation Fund

### PLEASE MAIL THIS FORM TO:

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