

Fox Cities Performing Arts Center – Endowment Fund Investment Policy

In accordance with investment policies established by the Fox Cities Performing Arts Center’s finance and budget committee and approved by the board of directors, all gifts in support of The Keystone Campaign Endowment Fund (unless designated by the donor) will be invested in a board designated endowment fund.

Endowment Funds

- **Description:** Endowed funds are those that have been given in perpetuity.
- **Investment Objective:** Preservation of principal to allow distribution of income for designated uses.
- **Authority:** These funds shall be overseen by the finance and budget committee, invested on a long-term basis in accordance with the investment policy. Spending withdrawals will be made in accordance with the spending policy.

The plan for the board designated endowment fund is to distribute five percent (5%) of the prior twelve (12) month quarter average fund balance to the annual operating budget to support activities of the Fox Cities Performing Arts Center. In the event of unusual circumstances, the board of directors may approve additional distributions as deemed necessary to support activities of the Center.

The Center’s endowment funds are managed by Thrivent Financial and invested conservatively in order to preserve the principal to allow for distribution of income for designated uses.

Fox Cities Performing Arts Center – Recognition Policy

Gifts to The Keystone Campaign will be acknowledged in the Center’s annual report throughout the period of the campaign. All donors who gift in excess of \$5,000 will be permanently recognized on The Keystone Campaign Donor Wall of Honor located on the Dress Circle Lobby.

I/We have read and understood the Center’s endowment fund investment policy.

Street Address _____

City _____ State _____ Zip _____

Phone _____ Email _____
day eve

Signature(s) _____ Date _____

Thank you for your generosity! Your gift is gratefully received by the Fox Cities Performing Arts Center, Inc.

Maria Van Laanen, President, Fox Cities Performing Arts Center, Inc. Date _____

Questions? Please contact Nicholas Reising, Director of Development, Fox Cities Performing Arts Center, 400 West College Avenue, Appleton, WI 54911 nreising@foxcitiespac.com; phone (920) 730-3714; fax (920) 730-3784