ENDOWMENTS

A Gift That Lasts Forever
Establish a Legacy of Support

Throughout our lifetime, most of us strive to make a difference in the lives of others, providing gifts to the people and causes we value. Wouldn’t it be nice to know that you could continue to change lives even after you are gone—creating a legacy of support for the causes most important to you? By creating an endowment with Mayo Clinic—or adding to our existing endowment—you can give a gift that lasts forever.

**How It Works**

- You give cash, securities or other assets to an existing endowment or an endowment you create with Mayo Clinic. If you can’t give up assets today, consider making the gift in your will or other estate plan, specifying that you would like your gift to be used to fund an endowment.

- You determine if your endowment will be designated to fund a specific program or service, or given without restrictions to allow our board of directors to direct the fund to our most critical needs.

- We use a small portion of the fund to support our mission, but the balance always remains invested in order to perpetuate the fund.

**ENDOW YOUR ANNUAL GIFT**

Make a plan so that the programs and goals most important to you continue thriving after your lifetime.

<table>
<thead>
<tr>
<th>If your annual gift is:</th>
<th>Amount needed to endow your gift forever:*</th>
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<tbody>
<tr>
<td>$250</td>
<td>$6,250</td>
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<tr>
<td>$500</td>
<td>$12,500</td>
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<tr>
<td>$1,000</td>
<td>$25,000</td>
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<tr>
<td>$2,500</td>
<td>$62,500</td>
</tr>
<tr>
<td>$5,000</td>
<td>$125,000</td>
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</tbody>
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*At a 4 percent endowment spending level, 25 times an annual gift amount equals a perpetual gift.
A Case Study of Benefits

Jeff wants to support our annual needs throughout his lifetime by writing a check for $5,000 to Mayo Clinic each year. His gift qualifies him for a $5,000 federal income tax charitable deduction on his taxes each year he makes the donation.

Jeff would also like to extend his support after his lifetime. He makes a generous bequest in his will of $125,000 to Mayo Clinic to establish a new endowment. After Jeff’s lifetime, we use a portion of the endowment each year to fund our programs and reinvest the remainder, allowing it to grow and support annual payouts indefinitely. The $125,000 bequest also reduces the size of Jeff’s taxable estate at death.

Jeff is able to support our current needs during his lifetime with his annual gifts, and the establishment of his endowment ensures his support continues indefinitely after his lifetime.

We Can Help

We would love to work with you to help you create a lasting legacy that honors your values for many years to come. Please contact us today to learn more about establishing an endowment with Mayo Clinic.