

*the* **ALLIANCE**  
SOUTH DAKOTA MILITARY HERITAGE ALLIANCE, INC.



*CELEBRATING AMERICA AND  
THOSE WHO SERVED*

**MEMORIALIZE YOUR  
SUPPORT FOR THE  
LONG-TERM**

Most endowments are designed to keep the principal corpus intact so it can grow over time but allow the nonprofit to use the annual investment income for programs, operations, or purposes specified by the donor(s) to the endowment or the board of directors.





# OFFER BENEFITS TO THE ALLIANCE, OUR VETERAN COMMUNITY, AND THE DONOR.

## To The Organization:

There are advantages of a significant and growing endowment to the board of directors, CEO, officers, fundraisers, and staff members of the nonprofit organization. Here is a list of at least some of the benefits:

- ✓ **Creates an ongoing source of income.** Because a permanent endowment is an invested pool of money that provides a reliable source of income in perpetuity, the organization can count on annual distributions for its charitable work. With appropriate investment and spending policies, the endowment's purchasing power will be preserved.
- ✓ **Enhances stability and prestige.** A well-managed endowment sends a message of planned long-term stability, fiscal responsibility, and financial viability. It enhances the organization's prestige and credibility.
- ✓ **Allows program expansion.** Program expansion can be funded with distributions from endowment funds used for facility maintenance, equipment, and supplies, and for any other purpose designated by the donor or by the board of directors.
- ✓ **Provides independence.** Endowment contributions designated for specific purposes provide a measure of independence from economic, governmental, and political forces. This allows a program to continue and also enjoys a measure of independence from the need to generate income to support itself.
- ✓ **Offers flexibility for management.** Endowments offer options to meet new challenges by providing greater financial flexibility and self-sustaining income streams. Endowments can augment uncertain income sources, broaden the overall revenue mix, improve the income statement, and provide leverage for bond-rating capacity and loans for new facilities.
- ✓ **Builds pipeline of future gifts.** A growing endowment builds a pipeline of gifts that will mature in the future, because many endowment gifts are designed to be used at a future date, often upon the death of the donor. An organization that attracts deferred gifts enhances its future financial security and positions itself to enjoy increasingly larger gifts in the future.

## To The Donor:

Endowment contributions—both those that create new funds and those that add to existing funds—provide numerous benefits to donors.



- ✓ **Perpetuates the donor's values and priorities.** An endowment gift can perpetuate the donor's values in the wake of change; it can provide assurance that programs that are important to the donor will survive.
- ✓ **Creates a sense of immortality.** Because an endowment gift will be invested permanently, it can serve as a permanent tribute to the donor and extend the donor's values for future generations.
- ✓ **Makes significant investment in the future.** Endowment gifts are sometimes the donor's last (and largest) gift to the organizations they value most.
- ✓ **Endows annual gifts.** An endowment gift gives donors the option to perpetuate their annual gifts. For example, the \$100 per year donor might make a \$2,000 endowment gift in order to continue annual gifts of \$100 to the organization in the future.
- ✓ **Allows incremental funding.** Some donors do not want to give away their assets during their lifetimes, yet they want to see the benefits of the gift immediately. They establish endowment gifts through bequests or other gift vehicles that take place after their lifetimes.
- ✓ **Provides lifetime income.** Some kinds of endowment gifts—split interest gifts—pay income to the donor for life, with the remainder going to the charity's endowment after the donor's death. These kinds of gifts provide stable income to the donor during retirement.
- ✓ **Alleviates management burden.** Some donors, particularly as they become older, are uneasy with managing their assets and making investment decisions. A split interest gift enables the donor to receive regular income for life without the burden or cost of managing investments.
- ✓ **Permits additions at a later time.** The donor, or the donor's friends and family, can add to a named fund from time to time by simply identifying the fund as the object of the gift. It makes a handy vehicle for people, especially family members, who wish to make meaningful gifts.

# FUNDED GIFTS

## **Percentage of Estate- For unrestricted purposes**

I hereby give, devise, and bequeath to the South Dakota Military Heritage Alliance, a nonprofit \_\_\_\_\_ **percent (%)** of the rest, residue, and remainder of my estate as an unrestricted gift to be used in the area of greatest need at the time the gift is received.

## **Percentage of Estate- For a specific purpose**

I hereby give, devise, and bequeath to the South Dakota Military Heritage Alliance, a nonprofit \_\_\_\_\_ percent (%) of the rest, residue, and remainder of my estate to be used for (describe the purpose)

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## **Specific Amount- For unrestricted purposes**

I hereby give, devise, and bequeath to the South Dakota Military Heritage Alliance, the sum of \_\_\_\_\_ **dollars (\$)** as an unrestricted gift to be used in the area of greatest need at the time the gift is received.

I may choose at a later date to enter into a separate agreement between myself and the Alliance related to the use of this gift and would request that the Alliance utilize the gift in accordance with the terms of that agreement.

## **Specific Amount- For a specific purpose**

I hereby give, devise, and bequeath to the South Dakota Military Heritage Alliance, the sum of \$ \_\_\_\_\_ dollars (\$) to be used for

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It is understood and agreed that should the purpose for which this bequest is instituted cease to exist, then the Alliance may devote said bequest for such other uses and purposes as it determines to be in accordance with my original intent in making this gift.

You may also provide the Alliance. with a copy of the portion of your will that states your bequest intentions for South Dakota Military Heritage Alliance.

# PLANNED GIFTS - STATEMENT OF INTENT

This statement is an expression of my intent to provide for the future of the South Dakota Military Heritage Alliance through a planned or estate gift. The provision(s) made include the following:

- An outright bequest** upon the passing of the donor, or the passing of the donor and spouse.
- A life insurance policy**, in which is named as beneficiary or owner and beneficiary.
- Retirement account**, in which South Dakota Military Heritage Alliance is named as a beneficiary.
- A trust or annuity**, with income reserved for the donor, spouse, or other income beneficiary.
- Other** (please specify) \_\_\_\_\_

**The estimated value of my (our) gift is \$** \_\_\_\_\_

**Purpose** – It is my wish that the gift be used:

- At its discretion, to create the greatest impact for South Dakota Military Heritage Alliance by supporting its most compelling needs and opportunities.
- For the following existing fund(s) or purpose:**  
\_\_\_\_\_

- To create the following fund (please provide fund name/purpose):**  
\_\_\_\_\_

**Special circumstances of my gift include:**  
\_\_\_\_\_

I would like to work with the South Dakota Military Heritage Alliance to create a gift agreement that details the purpose of my gift.  **Yes**  **No**

I will provide you with a copy of my will, policy, trust or beneficiary designation and appropriate contact information.  **Yes**  **No**

# RECOGNITION

The South Dakota Military Heritage Alliance appreciates the opportunity to acknowledge your commitment to the mission by publicly recognizing your contribution. If you prefer to remain anonymous, however, we will respect your wishes.

I (we) permit the South Dakota Military Heritage Alliance to use my/our name(s) in printed lists of gifts, which may appear in the South Dakota Military Heritage Alliance websites and/or other publications. When published it should appear as:

\_\_\_\_\_

I (we) prefer to remain anonymous during my/our lifetime(s). You may recognize my/our gift after you receive it.

I (we) prefer to remain anonymous during and after my/our lifetime(s).

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse's Signature

\_\_\_\_\_  
Date

Printed Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_

E-mail: \_\_\_\_\_

Thank you for your commitment to the South Dakota Military Heritage Alliance and your investment in our future. If you have any questions, please contact the South Dakota Military Heritage Alliance at:

605.271.1582 or [info@southdakotaalliance.org](mailto:info@southdakotaalliance.org)

[www.southdakotaalliance.org](http://www.southdakotaalliance.org)

***Thank You!***

# Who We Are

The Alliance consists of three key allies: veterans, active military service members, and the at-large community.



The leadership of the **South Dakota Military Heritage Alliance** is comprised of passionate, energetic, and focused leaders. The Alliance includes veterans, led by the American Legion and VFW, active military service members and their families, civilians, elected officials, business leaders and other key individuals and resources from our local community and around South Dakota.

## Why You're Important...

Yes, your talent and financial support are critical to the mission.  
But it's more.

### **A PLACE FOR FREEDOM**

Join us in celebrating our country and freedom; be who you are; have fun, express yourself, be involved as you want to be.

### **A PLACE TO REMEMBER**

Never forget those before us - those who gave some, and those who gave all.

### **A PLACE FOR ALL**

One place for veterans, active military service members and our community to come together to celebrate, unify, and support others.



# THANK YOU for being a part of this remarkable project.

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This effort is remaking the landscape between active military service members, veterans and the civilian community. It has quickly become a national model for fostering these connections and it starts with a unique facility equipped to provide a world-class experience:

- **Event Center - Veteran, Military, and Community**
- **State of the Art Gun Range**
- **Club Lobo Lounge**
- **Patriot Grill w/Full Kitchen Facilities**
- **Space for Veterans and Military Causes**
- **Proactive Veteran Health Services**
- **Future Military Heritage Museum**



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