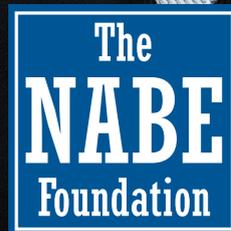
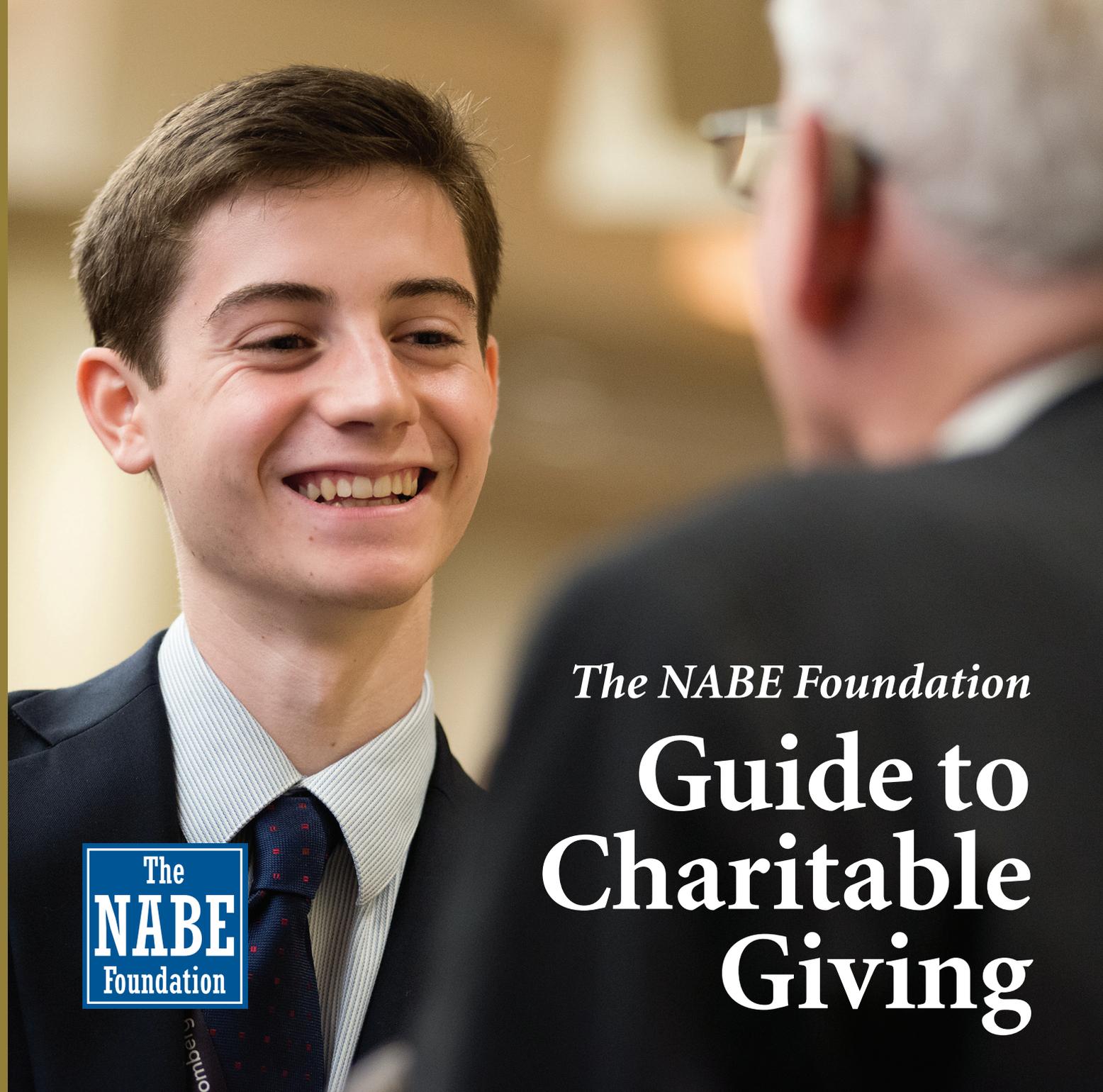




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The NABE Foundation
**Guide to
Charitable
Giving**

Our Mission:

The NABE Foundation seeks to enhance the field and application of business economics by:

- Providing professionals with the information, tools, and development opportunities they need to succeed;
- Developing the next generation of leaders within the profession;
- Supporting research to advance knowledge and applications in the field; and
- Helping to inform and educate the public by encouraging the understanding and use of the tools of business economics.

The Foundation is the 501(c)(3) charitable arm of the National Association for Business Economics (NABE).

What does *The Foundation* do?

Education & Development

- Supports Certified Business Economist® Candidates
- Hosts Economic Measurement Certificate Program (online and in-person)
- Funds Poster Session at NABE Policy Conference
- Funds economic policy-themed edition of *Business Economics* journal
- Produces biennial Salary Survey
- Funds economic competitions conducted by student chapters

Awards

- Adam Smith Award
- Edward M. Mennis Contributed Papers Award
- Funds NABE Outlook Award for best forecaster

Scholarships

- Economic Measurement Certificate Program
- Economic Policy Conference
- NABE Annual Meeting
- NABE Industry Conference
- Americans for the Arts/NABE Foundation Scholarship

Why Give to *The Foundation*?

The NABE Foundation provides an opportunity for business economists to “give back” to the profession that has provided them with their career.

An individual often supports many charitable causes. Supporting *The NABE Foundation* allows you to “pay it forward” to the next generation of economists.

Businesses and other organizations often contribute to causes embraced by their employees. We welcome any corporate contributions to these worthy endeavors.

Ways to Give

The Foundation's success depends on your support. This brochure outlines three ways you may donate:

- Our Annual Appeal
- The Endowed Scholarship Program
- *The NABE Foundation's* Legacy Circle



The NABE Foundation Annual Appeal

The Annual Appeal provides the lion's share of funding for *The NABE Foundation*. Each year, we ask our members to support the mission and important work of *The Foundation* by making a gift.

Annually, *The Foundation* raises more than \$100,000 through gifts from individuals, corporations, and other foundations. These donations allow *The Foundation* to provide scholarships, awards, and educational opportunities.

Members are most familiar with the Annual Appeal through its fundraising challenges at the NABE Policy Conference and Annual Meeting, in addition to various other solicitations throughout the year.

How do I donate?

To donate to the Annual Appeal, visit nabe.com/foundation.



The Endowed Scholarship Program

Want to make a lasting impact on the economics profession? *The NABE Foundation* now offers a unique opportunity for donors and their families to establish a named, endowed scholarship that will last forever.

What is an endowed scholarship?

An endowed scholarship begins with the contribution of funds – the endowment. This endowment is conservatively invested, generating interest income. A portion of this interest income (less a small management fee) is used each year to fund a scholarship for a worthy recipient. Any excess earnings are reinvested to augment the endowment and to compensate for inflation and recessions in future years. The annual scholarship is given in an amount that will not diminish the principal amount of the endowment fund.

Some donors choose to honor a loved one, recognize a favorite professor or mentor, or create the endowment in their own name.

General Guidelines

Donors may use either outright gift or deferred gift vehicles to establish named, endowed funds. Outright gifts of cash or stock can be made by completing the endowment immediately, or through a pledge. Deferred or planned gifts such as bequests, income-producing gifts, life insurance, and retirement assets can also be used to establish an endowment in the future when the gift is received. Donors may influence the guidelines to be used in the selection of candidates, but are not permitted to be involved in the actual selection of candidates.

Must the endowment be funded entirely right away?

You may establish an endowed scholarship at any time with a pledge to *The NABE Foundation* in the amount of the endowed scholarship. Payoff of that pledge can be made over a period of up to five years. When your pledge has been completed, your scholarship will be fully endowed, and the first recipient will be selected the following year and each year forward.

You may also create an endowed scholarship with an estate gift through *The NABE Foundation's* Legacy Circle.

Two opportunities for you to consider:

NABE Annual Meeting Scholarship

Cost to fully endow: \$20,000

Each fall, NABE members gather in a major city for the organization's largest annual gathering which features scores of top analysts, economists, and policymakers offering keen insights on the U.S. and global economies. The four-day conference provides the awardee a first-hand opportunity to hear from decision-makers and thought leaders and network with leaders in the profession.

The scholarship will be awarded to a young professional (age 35 and under) who would otherwise be unable to attend the Annual Meeting.

The scholarship award and recipient name will be noted in the conference program.

The scholarship may be named as the donor so chooses, subject to approval by *The NABE Foundation*.

NABE Certified Business Economist® Program Annual Scholarship

Cost to partially endow: \$50,000

Cost to fully endow: \$150,000

The Certified Business Economist® (CBE) program is designed by leaders in the economics profession as a means to fill the considerable gap that exists between an academic education in economics and the skills and knowledge required for a successful career as a practitioner. Through a series of continuing education seminars and a rigorous written exam, participants achieve certification.

For complete information on the CBE, visit www.nabe.com/CBE.

The donor may partner with *The NABE Foundation* to determine the parameters for eligible applicants.

The scholarship may be named as the donor so chooses, subject to approval by *The NABE Foundation*.



The NABE Foundation's Legacy Circle

What is *The NABE Foundation's Legacy Circle*?

Life is short. However, legacies can last forever. A planned gift is an expression of your commitment to a cause and your intention to provide lasting support. Your gift provides financial support for future generations in perpetuity. You may never meet many of the beneficiaries of your generosity, but they will certainly know you and appreciate the impact your gift has on their lives. With a planned gift, you create a lasting legacy – a gift that never stops giving.

Why *The NABE Foundation's Legacy Circle*?

In planning your estate, you will likely find dozens of fine options to leave a legacy and to take care of the individuals and institutions that mean something to you.

In addition to family, places of worship, schools, and other institutions or charities, please consider giving to *The NABE Foundation*. In supporting *The NABE Foundation*, you have an opportunity to give back to the profession that may have provided the platform or the launch pad for your success.

Through your gift to *The NABE Foundation*, you can acknowledge what your training and career in the field meant to you and help those who seek to follow in your footsteps.

This is a personal decision and clearly one that is yours alone to make. You designate a fixed dollar amount or a percentage of your estate.

As a guide, *The NABE Foundation's Legacy Circle* asks you to consider **leaving 2%** of your estate to *The NABE Foundation*. Your planned contribution – of any size - would be of substantial and significant importance to *The Foundation*.

Funding Options for Your Planned Gift

There are a number of options commonly used to fund a planned gift. We have included brief descriptions of several popular methods for providing support. We hope this material will be of help in formulating your plans. Please contact us if you have any further questions.

Bequests

Individual will bequests are the most common form of planned giving. These gifts are immensely important to *The NABE Foundation*. While there is no immediate tax advantage, such gifts can help reduce estate taxes. We offer the following bequest language for your consideration.

“I, _____ (name), hereby bequeath to *The NABE Foundation* _____ % of my estate (or _____ % of the remainder of my estate) (or \$ _____) to be used for its general purposes.”

The above language is an example of an unrestricted bequest, since the assets can be used where most needed at the time.

Life Insurance

The gift of a life insurance policy offers an attractive method for making a substantial contribution. This gift generates a charitable tax deduction for the year in which it is given, if *The NABE Foundation* is named owner and beneficiary of the policy. The deduction is roughly equal to the policy's cash surrender value. Subsequent premium payments are also deductible.

Life Income Gifts

Life income gifts offer many advantages – secure investment, free professional money management, and tax reductions. Your circumstances will determine which life income plan is best. Several alternatives are outlined below.

Gift Annuities

Through cash or securities, you can purchase a gift annuity that will pay you a fixed amount of annual income for the rest of your life. Payments may begin immediately, or be timed to coincide with your retirement planning.

Unitrust

The unitrust provides you with an annual return of a stated percentage of the trust's assets. You can fund a unitrust with cash, securities, or other property, such as real estate. The unitrust can offer advantageous tax benefits and provides you with a great deal of flexibility.

Annuity Trust

This trust provides you with a fixed dollar annual return. The principal advantage of the annuity trust is that it provides predictable income each year regardless of any fluctuations in the earnings of the portfolio.