

# RELIGIOUS ORGANIZATION ENDOWMENT TRUST AGREEMENT

This Endowment Trust Agreement is made and entered into this  Day of  Month, 20  Year, by and between the parties listed below for the purpose of establishing a permanent endowment to support the specified religious organization.

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## 1. PARTIES TO THE AGREEMENT

**Donor / Trustor Name:**

Address:

City/State/Zip:

Phone Number:  Email:

**Religious Organization (Beneficiary):**

Affiliation / Denomination:

Address:

Represented By (Name and Title):

**Trustee (If different from the Organization):**

Address:

City/State/Zip:

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## 2. NAME AND PURPOSE OF THE ENDOWMENT

The fund established by this Agreement shall be known as the  **Endowment Fund**.

The principal purpose of this Endowment Fund is to provide support for (describe the specific religious, educational, missionary, or charitable purpose):

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## 3. INITIAL CONTRIBUTION AND ASSETS

The Donor hereby transfers to the Trustee the following initial assets to establish the Endowment Fund:

Cash Amount (USD): \$

Spelled Out:

Other Assets / Securities / Real Property (Description):

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## 4. ADMINISTRATION AND DISTRIBUTION POLICY

The Trustee shall manage and invest the Endowment Fund assets in accordance with applicable laws governing religious and charitable trusts.

**Distribution Choice (Type "YES" in the box that applies):**

[  ] **Strictly Restricted Principal:** The principal of the fund shall be held in perpetuity. Only the net income and capital gains may be distributed for the purposes designated above.

[  ] **Term Endowment:** Both principal and income may be distributed, provided that the fund is maintained for a minimum period of  years before full dissolution.

[  ] **Board-Discretionary:** The governing board of the Religious Organization shall have the authority to allocate principal and interest as deemed necessary in alignment with organization bylaws.

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## 5. ACKNOWLEDGMENT AND SIGNATURES

By signing below, the parties agree to the terms, conditions, and restrictions set forth in this Endowment Trust Agreement.

<b>Donor / Trustor:</b>	<b>Authorized Trustee / Church Representative:</b>
Signature: <input type="text"/>	Signature: <input type="text"/>
Printed Name: <input type="text"/>	Printed Name & Title: <input type="text"/>
Date: <input type="text"/>	Date: <input type="text"/>

## 6. NOTARY PUBLIC ACKNOWLEDGMENT (IF REQUIRED)

State of  County of

On this  day of , 20, before me, the undersigned notary public, personally appeared the Donor, known to me (or satisfactorily proven) to be the person whose name is subscribed to the within instrument, and acknowledged that they executed the same for the purposes therein contained.

Notary Public Signature:

My Commission Expires: