



# Our Lady of Lourdes Catholic Classical School Endowment Fund

*Authentically Catholic | Fully Affordable | Uniquely Classical*

## What is an Endowment Fund?

An endowment fund is a lasting investment that will help sustain our mission for generations to come. Gifts to the endowment are permanently invested, supporting the school's operating needs. This means your generosity today continues to bear fruit—year after year—helping us share the faith, educate hearts and minds, and ensure that our mission thrives well into the future.

## Why an Endowment Fund?

Because tuition covers only half of our school's operating costs, every year we have a significant and growing fundraising requirement. An endowment will provide a permanent income stream that will help us ensure the long-term financial viability of the school.

### Our goals:

- **Short-Term (2-3 years):** Raise \$5 million to provide annual support for school operations and scholarships.
- **Long-Term:** Continue to build the fund through estate gifts and other planned gifts so that tuition remains affordable.

## Why Give Now?

Thanks to a generous benefactor, **every gift to the Endowment Fund through June 30, 2026, will be matched dollar-for-dollar up to \$1 million!** This extraordinary opportunity means your generosity today goes twice as far— together, we can build a lasting legacy of authentic Catholic classical education.



## How to Give

We have partnered with The Catholic Foundation of Northern Colorado, which has over 27 years of experience managing funds like ours in accordance with Catholic teaching using a morally responsible investment policy. The Catholic Foundation welcomes a variety of gift types — including cash, checks, securities, donor-advised funds, estates, life insurance policies, retirement assets, real estate, and more (see [next page](#)). **Gifts to our endowment fund must be made directly to The Catholic Foundation, not to Our Lady of Lourdes.**

**To give online, please click on the ‘Donate’ button below and follow these instructions:**

1. Choose your gift amount and indicate if it’s a one-time or recurring donation.
2. On the drop down menu under ‘I want to support,’ select Our Lady of Lourdes Catholic Classical School.
3. Proceed to fill out your personal and billing information.

**Donate**

If you wish to give by check or cash, please make payable to The Catholic Foundation, with **“*Lourdes School Endowment Fund- 7723*”** noted on the memo line.

**Please mail to the following address:**

The Catholic Foundation  
*Attn:* Lourdes School Endowment Fund  
6160 South Syracuse Way, Suite 111  
Greenwood Village, CO 80111  
Tax ID: 84-1481641

## Contact Us

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*“The mission of the Catholic school is the integral formation of students, so that they may be true to their condition as Christ’s disciples and as such work effectively for the evangelization of culture and for the common good of society.”*

*– St. John Paul II*

There are many ways to contribute to the Our Lady of Lourdes Catholic Classical School Endowment Fund through the transfer of appreciated assets. You make a bigger impact, while reducing your tax liability.

<i>Contribution Type</i>	<i>Benefit of Asset Transfer</i>	<i>Process</i>	<i>Tips</i>	<i>Time Considerations</i>
<b>Stocks and Mutual Funds</b>	Appreciated Securities are valued at the average of high and low price on the day transferred for use as a charitable deduction, if you itemize deductions.	Send a donation form to your broker with the Our Lady of Lourdes Catholic Classical School Endowment Fund Account at The Catholic Foundation. Forms are available from The Catholic Foundation.	Notify The Catholic Foundation of your transfer in writing.	Timing depends on the broker processing the transfer. The value is the average of high and low price on the day transferred.
<b>Retirement Assets (Traditional IRA) Qualified Charitable Contribution (QCD)</b>	If you are over 70 ½, a QCD up to \$108K for 2025 (\$115K for 2026) per year from your IRA is tax free.	Contact your IRA representative to transfer your IRA distribution directly to the Our Lady of Lourdes Endowment Fund.	For other retirement assets contact the fund administrator for specific advice on gifting strategies.	Please allow 2-4 weeks for your transfer.
<b>Donor-Advised Funds (DAFs)</b>	Donor-Advised Funds allow tax-deductible contributions that can be distributed later to charities.	Request a grant to the Our Lady of Lourdes Catholic Classical School Endowment Fund from an existing DAF by contacting your administrator or visiting the website.	The Catholic Foundation can provide additional information for the setup and use of DAFs.	Please allow 1-2 weeks for your transfer. Some charitable gift managers have earlier deadlines for distributions at year end.
<b>Real Estate</b>	Appreciated Real Estate is valued at the price used when gifted for use as a charitable deduction, if you itemize deductions	Contact The Catholic Foundation for options and documents needed.	Per the IRS, gifts of real estate need a qualified appraisal.	Timing varies, but typically we can review and process real estate gifts in 1-3 months.
<b>Charitable Remainder Trusts</b>	When selling real estate or business assets, a Charitable Remainder Trust allows all or part of the sale to be designated as a charitable donation for an associated tax benefit.	Contact The Catholic Foundation for options and to access qualified legal and tax advisors.	You can also donate a part of the business prior to sale to help with the tax ramifications of selling the business.	This varies.
<b>Assignment of Life Insurance Policies</b>	Policies no longer needed can be donated rather than cashed out.	Contact The Catholic Foundation for options and documents needed.	Whole life policies can be given as a tax deduction now.	This varies.
<b>Charitable Gift Annuities</b>	Receive a fixed income stream for life in exchange for a donation.	Contact The Catholic Foundation for options and documents needed.	Appreciated property, and stock are great assets for CGA's.	Stock is a quick transaction; real estate takes a little longer. If you have a low basis it is a great way to help with taxes.