



ENGAGED FOR LIFE

Endowment at

Carroll 
College



THE ENDOWMENT AT CARROLL COLLEGE

Carroll College's endowment exists to ensure our long-term financial stability, and for this reason building the endowment has long been one of Carroll leadership's highest priorities. Endowed gifts are meant to exist in perpetuity and are invested for long-term growth with this goal in mind.

Each year approximately five percent of the three-year average of the endowment fund's fair market value is available to support scholarships, academics, student life, mission-centric programming, faculty enrichment and endowed professorships, as per restrictions.

The college may vary the spending rate to meet the needs of the endowment, adjust to market conditions, and ensure preservation of capital. Return on the endowment exceeding the normal spending allocation is retained as part of the overall fund balance.



“This spring marks my 80th semester of teaching and research. So why do I stay? I stay because I am having the time of my life! The Manion Endowed Professorship, graciously provided by ‘friends of Doc Manion,’ allows me to do what I have always thought was important to young students—provide challenging teaching and fascinating research. I thank Carroll, its friends, faculty and students for the marvelous opportunity to hold the position of Manion Chair.”

~ Dr. Gerald Shields, Class of '66
James J. Manion Endowed Chair of Biology

ENDOWED PROFESSORSHIPS

Endowed professorships require a minimum investment of \$100,000 and naming opportunities are as follows:

\$100,000	Endowed Professorship
\$250,000	Distinguished Endowed Professorship
\$500,000	Chair
\$1,000,000	Distinguished Chair
\$2,000,000	Distinguished College Chair

Distributions from endowments may be used to supplement salary, enhance research and provide other professional support for the holder of the endowed position, as designated by the donor.



ENDOWED SCHOLARSHIPS

Since its founding in 1909, Carroll College has provided generous scholarships to worthy students making it possible for Carroll to continue building an extraordinary community of scholars, with funds assigned according to need and merit. Carroll's generous financial aid packages make the college competitive among public and private institutions with more than 98% of our students receiving some form of financial aid.

Carroll's award-winning academic programs and highly regarded educational experience prepare students to enter successful careers, but also to succeed in all of life's challenges. At Carroll, we educate the whole person—MIND, BODY and SPIRIT. It's the hallmark of a Carroll education. Your support is needed to continue this tradition of excellence and affordability.

Establishing an Endowed Scholarship

Our endowed scholarships are the result of gifts to Carroll by individuals, foundations or institutions interested in helping Carroll students succeed in their academic endeavors. Scholarships may be named in memory of, in honor of or in recognition of individuals or organizations.

The minimum funding level for an endowed scholarship is \$25,000 and once fully vested will be recognized and administered as a scholarship.

Donors connect with the students they have supported through campus visits and letters from scholarship recipients. Students create relationships with the generous donors who have supported their educational aspirations.

Scholarship Gift Restrictions

Donors may restrict awards on the basis of need or merit. The donor, in consultation with the Office of Institutional Advancement, may choose to give preference to students based on academic achievement, financial need, enrollment in specific courses of study, desired careers, geographic locations or a combination of factors.



“The endowed scholarship I received gave me the opportunity to stay at Carroll and reach my goal of completing my education at an outstanding institution. Carroll has provided opportunities I would have never thought possible.

“Through my experiences at Carroll, I was drawn to teaching and am now very excited to share the joy of learning with middle school students. My energy and passion for teaching are qualities I will bring to the classroom.

“My goal is to someday provide the same opportunities for others—to help young people succeed in the classroom and to provide support for future Carroll students through a scholarship of my own.”

~ Daniel Simmons, Class of '15

**To establish an endowment at
Carroll College please contact:**

The Office for Institutional Advancement
1601 N. Benton Avenue
Helena, MT 59625

406-447-4491 • www.carroll.edu/giving

OTHER ENDOWMENT OPPORTUNITIES

In addition to scholarships and professorships, the college benefits tremendously from endowment gifts that support such areas as campus ministry, the library or faculty development. The Office of Institutional Advancement is available to assist donors who wish to establish an endowment in support of a special project or interest.



GIFT TYPES

Carroll College gratefully accepts cash donations, publicly traded securities, closely held securities (if convertible to cash), real estate and tangible personal property (if convertible to cash).

If an endowment is to be established solely through a planned giving vehicle or will, assistance from the Office of Institutional Advancement is available to insure the appropriate documents reflect the donor's intent in the naming and terms, as well as use of the funds.

If an endowment is to be funded over time, the suggested timeframe is no more than five years.

For current examples of endowments at Carroll College please visit our webpage at www.carroll.edu/giving.

Carroll College exists as a private 501(c)(3) charitable organization. All contributions are appreciated and are tax deductible as allowed by the law.





SHARING LOVING HELPING
EXPLORING EXPERIENCING
LEARNING SINGING **GIVING**
VOLUNTEERING NURTURING
DREAMING PLANNING
WING GROWING
TRIVING LIVING

FOR LIFE

Endowment at

Carroll 
College

Not for school, but for life.



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