



IT'S YOUR LEGACY. EXPLORE IT.

ENDOWED GIFTS

Endowment funds not only make a lasting impact at Cal Poly, they also offer the opportunity to honor your family name or pay tribute to a loved one. You can establish an endowment with a contribution of cash, securities, real estate or a planned gift.

HOW IT WORKS

When you make an endowed gift, your contribution is invested with and becomes a part of our endowment. An annual distribution is made for the purpose you designate. Because the principal remains intact, the fund will generate support in perpetuity.

Endowments provide a consistent flow of support to students and allow the university to plan into the future. Minimum gift levels to create various types of endowments have been set to guarantee that income will be adequate to achieve the benefactor's vision, both now and in the future. Gifts of any size may be added later to increase the endowment over time.

Based on the Cal Poly Foundation's spending policy, the Foundation currently distributes 4.00 percent of the three-year rolling average in the fund. Any additional returns above this amount are reinvested into the fund to allow the fund to grow and defeat inflation over time.

Gifts at the following levels can create permanent named endowments at Cal Poly:

TYPE OF ENDOWMENT	THRESHOLD FOR INITIAL GIFT	ANNUAL PAYOUT AT 4.00%
Chair	\$3,000,000	\$120,000
Professorship	\$1,000,000	\$40,000
Project-Learning Lab/Shop	\$750,000	\$30,000
Visiting Faculty	\$500,000	\$20,000
Graduate Fellowship	\$250,000	\$10,000
Lecture Series	\$100,000	\$4,000
Senior Project/Research	\$50,000	\$2,000
Scholarship	\$25,000	\$1,000

CAL POLY

Office of Gift Planning

CONTACT US

1 Grand Avenue
San Luis Obispo, CA
93407-0444

800-549-2666 | 805-756-7125

plannedgiving@calpoly.edu

plannedgiving.calpoly.edu



CAL POLY
Office of Gift Planning
UNIVERSITY DEVELOPMENT
& ALUMNI ENGAGEMENT