

FOUNDING DONOR WALL OF HONOR

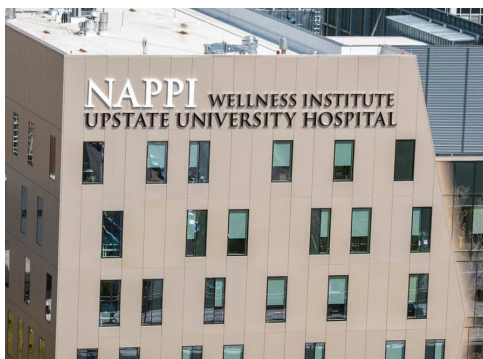


A Lasting Legacy
Named Giving Opportunities

UPSTATE
FOUNDATION

Where your gift impacts the
health of the entire region.

www.UpstateFoundation.org



Named giving opportunities

To the Upstate Foundation, a name is a valued and treasured commodity. Its significance is evident by the number of successful endowment campaigns that have raised millions of dollars throughout the Foundation's history; by the hundreds of named funds the Foundation manages; and by the hundreds of named areas commemorating donor generosity. A name gives people a compelling reason to give, and named gifts keep legacies alive forever. These are reasons why the Foundation is pleased to offer named giving opportunities.

Named giving opportunities include establishing funds for patient care, education, research, and community health and well-being. Benefactors may also designate a specific room or building in a person's honor or memory. Corporations, too, may want to consider named giving opportunities as a mutually rewarding partnership with the Upstate Foundation.

Named Funds for patient care, education and research

There are three kinds of funds at the Foundation: endowment funds, restricted funds and donor-advised funds.

Endowment funds can be established for a minimum of \$10,000. Endowments are lifelong funds in which the principal sum (consisting of all donations over the lifetime of the fund) remains permanently invested through the Foundation and generates investment returns. A purpose is identified when an endowment is opened, and market earnings can only be spent for that purpose. A fund advisor is assigned to monitor the activity of the fund and recommend expenditures. Fund advisors are generally Upstate employees. The Foundation makes all final decisions on spending approvals.

Since the principal must remain intact, potential spending must be supported by the endowment's lifetime investment earnings. The maximum spending allocation is a percentage of a rolling 36-month average of the principal and earnings. The Foundation, through its board of directors, reserves the right to adjust this percentage, based on market activity, to protect the long-term value of endowments.

Restricted funds can be established for a minimum of \$1,000, and must maintain a minimum balance of \$1,000. A purpose is identified when a fund is opened, and money can only be spent for that purpose. A fund advisor is assigned to monitor the activity of the fund and recommend expenses. Fund advisors are generally Upstate employees.

With restricted funds, the principal is guaranteed and an administrative fee is not charged. Restricted funds function similarly to checking accounts in that money goes in and money goes out. However, unlike endowments which are permanent, a restricted fund can be closed. If its balance falls below \$1,000, the fund advisor will be contacted to discuss closing the fund.

Donor-advised funds can be established for a minimum of \$5,000 or \$10,000. A donor-advised fund established for \$5,000 functions similarly to a restricted fund except that the donor is the advisor recommending to the Foundation how funds are to be spent. A donor-advised fund that is established for a minimum of \$10,000 can be likened to an investment account dedicated solely to a donor's charitable giving. The principal is invested through the Foundation, generating investment returns. Both the principal and investment returns are available for spending based on the donor's recommendations. Although this type of donor-advised fund is not a lifelong fund like an endowment, a donor may appoint a successor to continue his or her legacy of giving. Gifts from donor-advised funds may only be made to supporting organizations that are established 501(c)3 charities recognized by the IRS.

Naming Opportunities*

New buildings

Minimum gift of a percentage of the cost of construction

Rooms

Laboratories	\$35,000 – \$250,000
Waiting rooms.	\$25,000 – \$250,000
Conference rooms	\$25,000 – \$100,000
Patient rooms	\$25,000 – \$50,000
Offices.	\$10,000 – \$35,000
Utility rooms.	\$5,000

Grounds

Green areas	\$10,000 – \$50,000
Garden tiles	\$2,500 – \$25,000
Benches.	\$5,000 – \$15,000

Useful life items

Furniture, fixtures and equipment.varies
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Please note, there are other variables affecting the value of buildings, rooms and grounds including age of the facility, size, visibility, location, and costs to construct, rehabilitate, furnish or equip.

Academic endowment naming opportunities*

Endowed President.	\$7.5 million
Endowed Dean	\$5 million
Faculty Chair.	\$2.5 million
Professorship	\$1 – \$1.5 million
Visiting Professorship	\$500,000 – \$750,000
Visiting Fellowship	\$100,000
Lectureship	\$50,000
Scholarship/Award	\$10,000

*Namings are payable over multiple years.

Annual fund donor walls

Upstate Cancer Center.	\$100+
Upstate Golisano Children's Hospital	\$100+
Friend In Deed.	\$100+

The above list is simply a sampling of the naming opportunities available at Upstate Medical University. Please consult an Upstate Foundation development officer for more information.



Dean M. Janice Nelson
Nursing Scholarship
Endowment

Naming annual scholarships

One-time gift to provide financial support to an outstanding student.

College of Nursing

Annual Tuition Scholarship \$3,500 – \$32,000

College of Health Professions

Annual Tuition Scholarship \$7,000 – \$42,000

College of Medicine

Annual Tuition Scholarship \$45,000 – \$68,000

The Upstate Foundation was founded in 1976 as a 501(c)3 not-for-profit corporation to receive and administer gifts and bequests for charitable purposes with a focus on patient care, education, scientific research, and community health and well-being. A public charity with the ability to make distributions to any qualified nonprofit organization, the Upstate Foundation's primary orientation is supporting the mission of Upstate Medical University.

The Upstate Foundation offers donor-advised funds and is licensed to issue charitable gift annuities in New York and Florida. The Foundation is largely self-supporting with the assets it manages totaling nearly \$270 million.

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