

**SAMPLE**

August 19, 2014

RE: Endowment Trust Inquiry

Dear Father:

Thank you for your recent inquiry about the St. Ambrose Financial Services, Inc. Endowment Trust.

I am pleased to enclose the following resource material for your study:

1. St. Ambrose Financial Services, Inc. Endowment Trust Guidelines.
2. St. Ambrose Financial Services, Inc. Investment Policy dated October 2013, which is referenced in item #1.
3. A sample of the trust document that we use as a model document.

A sample document is enclosed to use as the format. For your convenience, you may pencil wording changes or modifications onto the sample document to fit your situation and return the sample to me. We will make the changes on our computer contingent upon review and approval by our Diocesan attorney. We will then return a new copy for your further consideration and study. Please also feel free to give me a call with any questions you may have.

A caution should be considered that parishes unwittingly place excess funds in the Endowment Fund and are caught short for operating expenses. I pass this on as an observation of some of the parishes.

Best wishes as you pursue this important work.

Sincerely,

Sondra Rieder  
President, St. Ambrose Financial Services, Inc.

Enclosures