

## Make a Gift to the SAM Youth Endowment

### TYPES OF GIFTS

**Cash and Securities:** Outright gifts of cash, checks, or negotiable stock, bonds, etc., or naming the SAM Youth Endowment as recipient of interest or dividends on securities.

**Memorials, Honorariums:** Making a gift in memory or honor of an individual or group.

**Life Insurance:** Naming the SAM Youth Endowment as recipient of annual dividends, first, second, or third beneficiary, final beneficiary at time of retirement or death settlement arrangement; or recipient of paid-up policy.

**Deferred Gifts such as Wills, Trusts, and Estates:** Naming the SAM Youth Endowment Fund which returns an income to the donor over the donor's lifetime. After a period of time or upon death of the donor or donor's beneficiary the remainder of annuity assets become a gift to the SAM Youth Endowment.

Donors should consult with their tax lawyers or accountants for up-to-date tax information.

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Please make checks payable to:  
SAM Youth Endowment Fund  
900 No. Montana Avenue, Suite A-4  
Helena, MT 59601

**THANK YOU!**



*Educational leaders, advocates for youth*

## Youth Endowment Program

*Serving Montana Children*

School Administrators of Montana  
900 North Montana Avenue, Suite A-4  
Helena, MT 59601  
406-442-2510

## PURPOSE

The purpose of the School Administrators of Montana Youth Endowment Fund is to make a positive impact on the youth of Montana by providing financial assistance to benefit children's health, welfare, and/or education.

## BACKGROUND

The School Administrators of Montana Board first discussed the endowment possibilities in January of 1998. At that time the Board felt it was important for SAM to be involved financially with a cause that affected the youth of Montana. The discussion led to the establishment of an endowment that would contribute to different charities making a positive impact on the youth of Montana.

In the Spring of 2001, the Board approved the SAM Youth Endowment Fund Guidelines for Assistance.

## MANAGEMENT OF THE FUND

The endowment will be administered by the Montana Community Foundation. MCF is a public supported charitable foundation with a central office in Helena and regional support throughout the state. While MCF has been retained to manage the financial business related to the endowment, the School Administrators of Montana Board retains control of the endowment and contributions that are made to charitable organizations. The interest of the earning will be reinvested to support charitable gifts.

## GIVING

For the endowment to be successful each SAM member will need to play an active role through ongoing financial support. School administrators have a history of being advocates for children in the State of Montana. The SAM Youth Endowment exemplifies this history.

## ENDOWMENT

The School Administrators of Montana Youth Endowment Fund has reached fruition. Awards to nominated recipients will be given in April of each year and announced in the May SAM Bulletin. Emergency requests will be accepted and presented to the board on an as requested basis made throughout the year. Recognition of the award will also be given yearly at the SAM Administrators Institute.

## NOMINATION GUIDELINES

Nominations may be submitted to the SAM office at any time throughout the year. The nomination must include a summary about the student and specific financial need. The criteria for the nominee is as follows:

1. Nominated student must be a Montana youth
2. Nominated student must be a K-12 student
3. Nominated student must have a financial need, i.e. health concern, family emergency, educational need
4. Nominated student must be nominated by a member of SAM

A nomination may be completed online at SAM's website under About SAM/ SAM Youth Endowment or by providing a request in writing. Your request should include the following:

Name of Nominee  
Address of Nominee  
School of Nominee  
Summary of student's financial need  
Requested amount of award (\$250, \$500, \$750 or \$1,000)

Name of Nominator  
Address of Nominator  
Email and Telephone of Nominator

The information must be completed in its entirety in order for it to be brought to the SAM Board of Directors for consideration. Nominations will be reviewed and awarded by the SAM Board of Directors at their regularly scheduled April meeting of each academic year.

*Application Submission Deadline for 2016-17 Academic Year:*  
**March 17, 2017**

**For additional information on the program and how to apply for funding, please contact the SAM office at 406-442-2510 or [sampa@sammt.org](mailto:sampa@sammt.org).**