



Fact Sheet for Donors

Legal Name: The Summit Foundation
Federal EIN: 74-2341399
Contacts: Jeanne Bistranin, Executive Director, jeanne@summitfoundation.org
Megan Nuttelman, Director of Donor Relations, megan@summitfoundation.org
Address: P.O. Box 4000
103 S. Harris Street Suites 201 and 204
Breckenridge, CO 80424
Phone: 970-453-5970
Fax: 970-453-1423
Website: www.summitfoundation.org

Founded in 1984, The Summit Foundation is a public community foundation dedicated to improving the quality of life for residents and guests of Summit County and neighboring communities.

The Summit Foundation Mission Statement

The Summit Foundation is the leading organization inspiring people and mobilizing resources to improve and enrich the lives of individuals in Summit County and neighboring communities.

The Summit Foundation Distribution of Funding

The Foundation seeks to partner with nonprofit organizations in these mountain communities as they operate programs that

- Create bright futures for children and youth
- Promote environmental stewardship
- Foster healthy and safe communities
- Enrich arts and culture

The Summit Foundation has provided \$26.3 million in grants to over 200 nonprofit organizations operating programs in Summit, Lake, Park and Grand Counties. In addition, \$2.99 million has been awarded by The Foundation in scholarships to local high school graduates pursuing post-secondary education.

The work of The Summit Foundation affects all of us in a positive way, every day. Whether it's providing affordable health care, protecting our great outdoors, working to build a just society, taking care of our pets, helping the arts to flourish and promoting culture, or making children's lives healthier, The Summit Foundation is at work throughout our community, improving quality of life and filling in where the public sector can't or won't.

Virtually everyone in our community will use a service or enjoy the work of a nonprofit organization served by The Summit Foundation several times in their life. An investment in The Summit Foundation will be returned many times over.



LEAVE A LEGACY®

Make a Difference in the Lives that Follow

Please remember The Summit Foundation in your will, trust, or other estate plans

What is a bequest?

A bequest is simply a gift you make to The Summit Foundation through your will which indicates your desire to leave something of value toward The Summit Foundation's future work. A charitable bequest can be a specific dollar amount or a percentage of the value of your total estate, a gift of stock or life insurance or even real estate. Gifts of all shapes and sizes are welcome. The spirit behind every gift is the same.

Recommended Language for Bequests and Testamentary Gifts:

Donors wishing to designate a gift to The Summit Foundation in their will or trust might consider using the following language:

"I wish to give (*choose the appropriate statement*) the sum of \$(a specific dollar amount) or (a specific number) of shares of (a specified) security or (specify) percent of my adjusted gross estate for federal estate tax purposes to The Summit Foundation, P.O. Box 4000, Breckenridge, CO 80424. Federal EIN: 74-2341399. Attention: Executive Director. The Summit Foundation may be contacted at 970-453-5970 or www.summitfoundation.org."

Use of Gifts:

The Summit Foundation welcomes conversations with donors about their interest areas and preferences. The Summit Foundation will work with donors and their advisors to identify the purpose within The Summit Foundation that most closely meets the donor's wishes. Generally, contributions made through a will or trust are designated to The Summit Foundation's board designated endowment fund, The Peaks Society Fund.

Every year, up to 5 percent of the assets of The Peaks Society Fund is distributed to the community through grants or special community projects of The Summit Foundation. The remainder is invested wisely to support the long-term financial health of The Summit Foundation and our community.

Thank you for considering The Summit Foundation in your legacy planning.

For more information, please contact The Summit Foundation at 970-453-5970 or www.summitfoundation.org



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