



Lotus Endowment Fund, Inc.

Information Sheet

Introduction: The Lotus Endowment Fund, Inc. is organized and operated exclusively as a supporting foundation for The Sundari Foundation, Inc. and its initiatives, including the Lotus House Women's Shelter. The Sundari Foundation is a 501c3 non-profit, non-denominational, public charity organized for charitable and educational purposes, including specifically providing relief to homeless, poor, distressed and disadvantaged women and children. The Endowment Fund is also a 501c3 non-profit corporation to provide donors the same tax benefits for their donations as donors to the Sundari Foundation receive.

Lotus House: The Sundari Foundation founded and operates the Lotus House Women's Shelter, a free, non-denominational, holistic residential facility and resource center providing shelter, sanctuary and comprehensive support services for homeless women and children. Lotus House is situated in the heart of the historic African American district of Overtown in Miami, Florida, an area suffering from extreme poverty and urban blight in one of the poorest large cities in the United States. Lotus House provides free housing for up to a year, three meals a day, clothing, and comprehensive support services, such as individual and group counseling, computer classes, job placement, access to medical and mental health services and a wide range of community resources, along with educational workshops and a host of enrichment activities such as art, creative writing, field trips, and much more. Lotus House also includes a special program for women who are homeless and pregnant and their infants, arranging pre-natal care, birthing and parenting classes, maternity supplies, and early infant medical care and screening, to ensure these fragile families can look forward to a better way of life. Lotus House is not a typical shelter but a place where the minds, bodies and spirits of women and children most in need are afforded an opportunity to learn and grow on every level. For more information on the Sundari Foundation and Lotus House Women's Shelter, please see the Foundation's brochure and website at www.lotushouseshelter.org.

Endowment Fund: The Endowment Fund was formed to secure the financial stability and long-term viability of the Sundari Foundation, so that the Lotus House Women's Shelter will serve as a resource for women and children in need for generations to come. In December 2007, a benefactor of the Fund gifted the land and buildings comprising the original Lotus House facilities to the endowment fund, which has in turn leased them to the Foundation under a fifty year lease, for a dollar a year, renewing in perpetuity so long as the property is used as a shelter for homeless women and children. This was an important first step toward achieving our goal of ensuring the financial stability of the Foundation and the Lotus House. We have more work to do to reach our goal of financial security for Lotus House. The immediate goal of the Endowment Fund is to raise a minimum of \$10 Million over five years, with a longer term goal of building a larger fund sufficient to ensure that the operating and capital needs of the Foundation are adequately provided for in perpetuity.



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Founders Initiative: The Fund has launched a special “Founders Initiative,” including levels of “Founder” at \$50,000-\$149,999; “Sustaining Founder” at \$150,000-\$499,999; “Grand Founder” at \$500,000-\$999,999; and Legacy Founder at \$1,000,000 and up.

All Founders will enjoy our annual Founders Appreciation Dinner, recognition on the Founders Appreciation Board installed in the Lotus House Resource Center, and inclusion in letterhead, press releases, our website and other materials thanking them for their generosity and support. Sustaining Founders will have the option to have their name installed on our beautiful recognition plaque at the entrance of a Guest room. Grand Founders will have their name installed on our recognition plaque in one of our main community rooms or gathering places in the shelter. Legacy Founders will have the option to have one of three buildings (maternity building, resource center, and original building) named in honor of the founder and his or her loved ones. For those who prefer, at the Sustaining Founder level and above, there are also naming opportunities associated with the many gardens, lotus pond, and sitting areas or to install a lovely garden bench in recognition of their gift if preferred as an alternative to the rooms and buildings. We can help select an appropriate memorial or legacy that achieves your goals, through structured gifts and/or estate planning, and provides appropriate recognition for your generosity.

For more information, please contact: Kathryn Villano or Constance Collins Margulies, of the Lotus Endowment Fund, Inc, at (305) 365-2478, for a personal meeting. Thank you!

DONATIONS TO THE ENDOWMENT FUND ARE DEDUCTIBLE TO THE FULL EXTENT PERMITTED BY SECTION 501(c)(3) OF THE FEDERAL TAX CODE (TAX ID # 92-0233563). A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION FOR THE ENDOWMETN FUND WITH THE STATE OF FLORIDA MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL FREE (800-435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL OR RECOMMENDATION BY THE STATE.



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Statement of Support Form

Gift:

As an expression of love and support for the mission of the Lotus Endowment Fund, Inc., a supporting foundation for The Sundari Foundation, Inc. and its initiatives, including the Lotus House Women’s Shelter, I/We desire to become a:

_____ Founder by making a gift of _____ (\$50,000 to 149,999) over 5 years;

_____ Sustaining Founder by making a gift of _____ (\$150,000 to 499,999) over 5 years;

_____ Grand Founder by making a gift of _____ (\$500,000 to 999,999) over 5 years; or

_____ Legacy Founder by making a gift of _____ (\$1,000,000 or more) over 5 years.

Please contact me to complete a pledge for this gift and determine the method of payment and schedule of installments that best suits my needs. Gifts may be made with cash, stock, and other assets. Bequests may also confer Founder status.

Bequest:

As an expression of love and support for the mission of the Lotus Endowment Fund, a supporting foundation for The Sundari Foundation, Inc. and its initiatives, including the Lotus House Women’s Shelter, I am pleased to report that I have made a gift or estate provision for the benefit of the endowment fund in my will as follows:

_____ [general description of gift provision (percentage, type, value, etc.). It is understood that values are subject to change, but I expect the present value of my/our provision to be approximately \$_____.

It is understood that these statements and intentions are made to assist the Lotus Endowment Fund in projecting future financial support and gift expectancies. THIS IS NOT A BINDING LEGAL OBLIGATION UPON THE DONOR OR HIS OR HER ESTATE AS TO THE VALUE OR RECIEPT OF THE PROVISIONS REVEALED HEREIN OR DESCRIBED. A copy of the provision is attached or will be sent when it is executed.



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Acknowledgement (please mark one):

_____ I would like my gift to remain anonymous.

_____ I authorize release of this gift for acknowledgment for internal and external purposes and media sources. Please list my name and/or honor the following person(s) with my gift/bequest:

_____ Please contact me about "naming" opportunities at the Lotus House in recognition of this gift and/or bequest.

Signature of Donor(s): _____
Date: _____

Other Comments: _____

