

**Foundation History:**

The Fortunaire Foundation was created in January 1965 by 24 of the Life Investors Top Producers. Those first Fortunaires were visionaries. They decided to establish the foundation with donated funds to be in held in a trust. The principal would be allowed to grow, and the available income would be allowed to be distributed annually to local community charities the Foundation members wished to support.

Later, the Foundation started a Scholarship program that has helped local students reach their goal of obtaining a college degree.

**Foundation Objectives:**

* To remain a charitable Foundation that is totally supported by the Collective Financial Group field force and its friends.
* To promote Foundation membership and fund-raising activities.
* To encourage Foundation members to support and become actively involved in worthwhile projects and charities in their communities.
* To foster good will in local communities by people helping people.
* To provide college scholarship support to deserving young adults in your local communities.

**Foundation Membership:**

Any member of the Collective Financial Group field force that makes at least a $100 financial contribution annually and meet the production requirements will become a member.

The cumulative giving levels are recognized at the following levels of giving over the life of the Fortunaire. Endowment Designations are for those Fortunaires who have donated at least

$ 1,000.

Silver Fortunaire $ 250

Gold Fortunaire $ 1,000

Sapphire Fortunaire $ 2,500

Emerald Fortunaire $ 5,000

Ruby Fortunaire $ 7,500

Diamond Fortunaire $ 10,000

Platinum Fortunaire $ 25,000

**Foundation Match Program:**

Members of the Foundation who have given at the Gold Fortunaire level or above may request matching contributions by sending their charitable contribution checks to the Fortunaire Foundation, along with a letter describing the non-profit local charitable organization listing the Tax ID #. Each request will be considered and decided in the sole discretion of the Board of Directors. Approved grants will be capped at a match of the following levels per year ($500 + 10% of member level). Any amounts that are in a matching request **will not** be counted as a member contribution.

Maximum Individual Match Levels Annually:

* Platinum $ 3,000
* Diamond $ 1,500
* Ruby $ 1,250
* Emerald $ 1,000
* Sapphire $ 750
* Gold $ 600

*Friends of the Foundation do not qualify for match requests.*

**Foundation Scholarship Program:**

Current Endowment Fortunaires are encouraged to contribute to the Scholarship Fund, to publicize the Scholarship Program in their communities, and to recommend one Scholarship Applicant per year. All Applicants must apply through a Current Fortunaire who will recommend him/her to the Scholarship Committee.

**Fortunaire Foundation Community Service Award:**

The Foundation Board will receive nominations for qualifying Fortunaire members for the Community Service Award annually. The nomination would be someone that goes above and beyond in their local communities for the betterment of their family, clients and community members. Nominations are accepted in the fall of each year.

**Fortunaire Foundation Levels:**

