

FREQUENTLY ASKED QUESTIONS:

What is the difference between the endowment and the Cate Fund?

The endowment is a fund that is made up of gifts and bequests that are subject to a requirement that the principal be maintained intact and invested to create a source of income for an organization. Cate's endowment as of 6/30/2008 above was \$69 Million and funds about 18% of the operating budget each year.

The Cate Fund is the name of the Cate's annual fund, which is an organized effort to raise support on a yearly basis from the School's alumni, parents, and friends. Presently, 10% of the Cate's operating budget is funded by the Cate Fund.

What is the difference between CPO dues and the Cate Fund?

CPO dues go to the Cate Parents' Organization, which does a wonderful job funding social activities for the students throughout the year. CPO dues go to support additional activities for the students, such as movie nights, the Holiday Dance, etc.

The Cate Fund accounts for 10% of Cate's operating budget and helps to fill the gap between tuition revenue and what it actually costs to educate a student on the Mesa.

What is a Senior Class Fund?

The Senior Class Fund is a fund created by senior parents and grandparents. This fund is a part of Cate's endowment and is an opportunity for Cate families to make a long term investment in Cate School that will continue to grow and benefit the School after their child graduates.

How will Cate invite my support each year my son or daughter attends?

Each year, a volunteer will call to speak with you about supporting the Cate Fund. In addition, if you have not made a gift of pledge, you will receive letters encouraging your support to the Cate Fund.

Also, it is useful to know during the freshman, sophomore, and junior year, parents will be invited to support the Cate Fund. Senior year, parents will be invited to support the endowment via the Senior Class Fund.

Will I have an opportunity to participate in the Centennial Campaign?

As a donor to the Cate Fund, your gift counts toward the Centennial Campaign. The Centennial Campaign will acknowledge Cate Fund gifts, gifts for capital purposes (faculty housing, etc.), and gifts to the endowment.

If a person says he or she is going to give to the Centennial Campaign instead of the Cate Fund, how should I respond?

First, you can reiterate that the Centennial Campaign is a comprehensive campaign. Thus, any gift given to the Cate Fund is counted in Centennial Campaign totals. However, we like to remind our families that the Cate Fund is Cate's first and primary fundraising priority.

If you speak with someone who would like to make a Centennial contribution as well, please have them contact me to further discuss their intentions. I will make sure to put them in contact with the right people. I can be reached at 805 684 4127 x 266.

May I make my gift in payments?

Yes, please contact Carolyn Frary to arrange a payment schedule. She can be reached at 805 684 4127 x 211

May I make my gift online?

All major credit cards are accepted at <http://www.catealumni.org/donations/> .

How do I make a gift of stock or a wire transfer?

Carolyn Frary will be happy to assist with any transactions and can be reached at 805.684.4127 x 211

What are the Gift Clubs?

Headmaster's Circle (\$50k and up)
Curits W. Cate Society (\$25k-\$49,999)
Senior Masters' Society (\$10,000-\$24,999)
Servons Society (\$5,000-\$9,999)
Mesa Associates (\$2,000-\$4,999)
The Parsonage (\$500-\$2,000)

Are there any benefits associated with gifts to the Cate Fund?

It is our hope that people will give to Cate in response to the great work the School does and their desire to support the teachers and programs that distinguish a Cate education. There are myriad intangible benefits associated with giving to Cate; however, should the School begin to provide goods or services for such gifts, the gift must be reduced by the amount of any goods or services received.