



# NORTH CAROLINA MASONIC FOUNDATION

NOVEMBER 2024

Dear Masonic Home For Children at Oxford Board of Directors,

- Rufus Walston Smile Fund – Initial Distribution Event – October 19 – Rufus Walston Taylor – Jane Walston Taylor – visit and first distribution from account \$1,032.06, given to MHCO in October; Balance at \$19,587.57 perpetual fund for dental needs of residents; annually in October.

### Planned Giving:

- CGA for LL – COMPLETE; provided to L. Clark; NPV of \$18k for MHCO at time of annuitant passing
- SS - MHCO named secondary beneficiary; endowed fund w/ NCMF; NPV - \$100k
- Continue cultivation with two prospects and ongoing PG discussions for MHCO pending notification, additional confirmation.

*\*\* Face sheets and documentation, if provided, given to L. Clark monthly upon confirmation from planned giving donor*

### Existing Funds Distribution - October/December:

- Cleveland LCA – \$766.06
- Casar LCA – \$1,199.54
- Youngsville LCA – \$9,739.49
- Carr Fund - \$1,750
- St. John's No. 1 – \$1,228.08

### NCMF to MHCO Furniture Campaign Update:

- Waynesville Lodge: \$2,000
- Old Town LCA: \$250

### Foundation Distributions:

- **Total Distributions YTD:** \$314,349
- **Quarterly Distribution:** \$104,783
- **YTD returns Equity Fund:** +17.25% Income Fund +2.34%

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