

Since becoming President, it has been one of my personal missions on how we continue to develop and expand our financial footing. Our ultimate goal is to create fiscal viability for another 40 years and beyond. I like to think of it as WY-WSF will be sustainable for many generations to come.

About 3 years ago, I approached Mike Porter/Asthon Thomas with the idea of establishing another investment fund to go along with the three we currently have: General, Life Member, and Conservation. We discussed creating some type of endowment or legacy type fund providing our members a donation conduit for endowed assets. Allowing them to contribute through a will or trust, retirement account and stock gifts, or even direct cash. We reviewed the model WSF created with their Legacy Fund. After several discussions with WSF and a few of their investment consultants, we developed a modified version more specific to WY-WSF and our membership.

In late Spring 2024, we finalized the Endowment Fund Policy. As part of the Policy, a Board of Trustees (BOT) is to be appointed having fiduciary responsibility of overseeing the assets of the Endowment Fund. The BOT is to consist of two current Board members in an Officer position and three members at large. After a lengthy research process, the BOT has been finalized. The members are Bralli Clifford and [Zach McDermott](#) from the Board and the members at large are Greg Clifford, [Dean DiJenno](#), and Pete Burchfield.

The BOT has begun working on the Investment Policy Statement (IPS) in collaboration with Ashton Thomas. We will be conducting our first meetings in March and April to finalize the IPS and at the June Meeting, we will unveil the official Fund Policy and IPS.

At the time of print, we are happy to announce we have received our first donations exclusively for the Endowment.

We look forward to seeing everyone at the Summer Expo and Banquet in Casper on June 6th and 7th, and will be available to answer any questions you may have regarding the Endowment Fund.