



INTERNATIONAL BROTHERHOOD OF MAGICIANS

Endowment & Development Fund

Investing in the Future of Magic

A GUIDE TO GIVING, GRANTS & LEGACY

THE CHARITABLE FOUNDATION OF THE I.B.M.

A Message from the Board of Trustees

Magic has always depended on the generosity of those who came before — the mentors who taught us, the Rings that welcomed us, the teachers who believed a trick could become an art form.

The Endowment & Development Fund (EDF) exists to carry that generosity forward. As the independent charitable foundation of the International Brotherhood of Magicians, the EDF receives gifts from members and friends of magic and puts them to work through education, grants, and long-term investment in the future of our art.

Every Honor Ring recognized, every young performer trained at a Teen Seminar, every grant awarded to a Ring or educator exists because someone, at some point, chose to give. This guide explains who we are, what we support, and how you can become part of that legacy.

On behalf of the Board of Trustees, thank you for taking the time to learn more about the EDF — and for considering how you might help write its next chapter.

“The memory of your wise philanthropy becomes part of the enduring story of magic itself.”

Who We Are

The Endowment & Development Fund of the International Brotherhood of Magicians is an independent, nonprofit organization that receives charitable donations and distributes funds exclusively for charitable, scientific, literary, and educational purposes connected to the art of magic. The Fund is governed by a three-person Board of Trustees, each a lifelong member of the I.B.M.

Our Vision

To advance the art of magic through education and performance — preserving its heritage while investing in the people, programs, and ideas that will carry it into the future.



EDUCATION

Supporting youth, students, performers, and educational opportunities that advance the art of magic.



PROGRAMS & GRANTS

Funding worthwhile initiatives that benefit magicians, Rings, educators, and the wider magic community.



RING EXCELLENCE

Recognizing outstanding I.B.M. Rings through the Honor Ring program and strengthening local organizations.



THE FUTURE OF MAGIC

Building a permanent charitable fund that helps ensure future generations can learn, perform, and enjoy magic.

Specifically, the EDF supports:

- Magic clubs, organizations, and schools
- Magicians, magic students, and magic enthusiasts
- Training programs related to magic performance
- Learning experiences related to magic
- Scholarly magic-related work by writers, developers, and researchers

Building on a Strong Foundation

The Board of Trustees regularly reflects on the EDF's direction, building on the work of the trustees who came before. That ongoing planning centers on three commitments:

COMMITMENT ONE

Sustain a Living Strategic Plan

Regularly revisit and refresh the Fund's priorities so that giving stays aligned with the needs of today's magic community — not just the traditions of the past.

COMMITMENT TWO

Invest in What Matters Most

Identify and champion program and grant initiatives that are clearly consistent with the EDF's core mission of education and preservation of the art.

COMMITMENT THREE

Build a Sustainable Fundraising Strategy

Grow a durable, diversified base of support — from annual gifts to planned and endowed giving — so the EDF can serve magic for generations to come.

Where We Focus

Strengths We Build From

- A close, trusted relationship with the I.B.M.
- Deep Board experience and institutional knowledge
- A stable financial footing for the Fund

Where We're Focused Next

- Raising the EDF's visibility across every Ring
- Strengthening I.B.M. membership and its financial footing
- Elevating magic's profile as a performing art
- Increasing transparency and communication with members

Signature Programs

Donations to the EDF are put directly to work through the following initiatives.

PROGRAM

Honor Ring Program

Recognizes I.B.M. Rings that have achieved excellence in leadership, youth development, community outreach, and member engagement. Approved Rings receive a \$1,000 grant.

PROGRAM

Lance Burton Teen Seminar

A day-long, no-cost seminar for young magicians held at the I.B.M. Annual Convention, led by top professional magicians and supported by donated items from convention dealers.

PROGRAM

Distinguished Lecture Series

Brings respected voices — sometimes from outside the magic community — to share insight into the performing arts and inspire learning and artistic growth among members.

PROGRAM

Educational Grants

Funds proposals from individuals, Rings, or organizations that promote magic education, research, and learning experiences that benefit the I.B.M. community.

The Honor Ring Program

Honor Ring status is the highest distinction a Ring can achieve within the I.B.M. Rings may apply at any time by submitting an application addressing six areas:

- Brief Ring history
- Outstanding attributes
- Notable past and present members
- Leadership development
- Youth programs
- Community service and outreach

No specific application form is required. Applications should also include an appendix listing the names and membership numbers of every Ring member, along with a statement affirming that (1) the list represents the Ring's entire membership, and (2) all members represent acceptable standards of moral and ethical behavior. All Ring members must also hold International-level membership, which can be verified through your Territorial Vice President, the EDF, or International Headquarters.

The Board reviews applications promptly and awards a \$1,000 grant to each approved Ring. Applications that don't yet meet the criteria receive feedback and suggestions for revision.

Rings Recognized for Honor Ring Status

Ring 1	St. Louis
Ring 5	Dayton
Ring 9	Atlanta
Ring 12	Buffalo
Ring 41	Milwaukee
Ring 76	San Diego
Ring 92	Vancouver
Ring 244	New York

Is your Ring next? Applications are accepted on a rolling basis — see the Grant Guidelines for how to apply.

Grant Application Guidelines

The EDF encourages and supports charitable magic education projects within the constraints of its available resources. Projects may be proposed by an individual, a group, or an organization.

Applications should be three to five pages and address the following, in order:

- Key project personnel, including a primary contact
- Applicant name, address, email, and phone number
- Geographic area to be served
- The problem to be addressed — demonstrating genuine need, not simply an opportunity
- The plan or method to meet that need
- Expected results and how the I.B.M. benefits
- Timetable for implementation
- Itemized budget, including any cost-sharing and total project cost

No application form is required, and proposals may be submitted at any time. The Board evaluates each proposal on the strength of its argument, its fit with the EDF's mission, and the funds available, and decisions are typically made within three months.

*Submit your project proposal to **ibmedf@magician.org***

Ways to Give

Every gift to the EDF strengthens the future of the International Brotherhood of Magicians. There are many ways to give — from a simple annual gift to a lasting endowment bearing your name.

We recognize that your first reason for giving is a desire to strengthen our organization — but thoughtful giving can also bring real personal and tax benefits to you. The options below can be tailored to different kinds of property and different giving structures. We encourage you to talk with one of our trustees about your plans; it helps ensure your gift accomplishes exactly what you intend.

ANNUAL GIFTS

Simple, flexible cash gifts — the most common way to support the EDF.

PLANNED GIVING

Gifts arranged now with benefit to the Fund deferred to a future date.

BEQUESTS

A gift designated to the EDF through your will or trust.

SECURITIES

Appreciated stock or investments given directly to the Fund.

REAL ESTATE

A home, land, or property gifted outright or with retained use.

LIFE INSURANCE

Naming or assigning a policy you no longer need to the EDF.

CHARITABLE TRUSTS

Remainder and lead trusts that balance family and charitable goals.

ENDOWED & MEMORIAL GIFTS

A perpetual fund created in your name or in memory of someone you love.

Gift Options at a Glance

Gifts of Cash

The simplest and most flexible way to give. Cash gifts can typically be deducted against your income, subject to IRS limits that vary by year — your tax advisor can confirm the current rules.

Gifts of Life Insurance

If a policy you once needed for income protection is no longer necessary, naming the EDF as owner and beneficiary can generate a charitable deduction, reduce or eliminate premium payments, and turn a policy you no longer need into lasting support for the Fund.

Gifts of Real Estate

A personal residence, vacation home, farm, or undeveloped land can be gifted outright, or you can deed a remainder interest while retaining lifetime use of the property. Either approach can offer meaningful tax advantages while relieving you of ongoing management responsibilities.

Gifts of Securities

Contributing long-term appreciated stock can provide a two-fold benefit: a charitable deduction for the full fair market value, and avoidance of capital gains tax on the appreciation.

Gifts of Tangible Personal Property

Art, books, or a magic-related collection built over a lifetime can become a meaningful gift to the EDF, particularly when the item relates directly to our educational mission.

Trusts, Endowments & Legacy Gifts

Charitable Remainder Trusts

You irrevocably transfer assets into a trust that pays income to you or your chosen beneficiaries for life or a term of years; when the trust ends, the remaining assets pass to the EDF. These trusts can offer income for life, potential tax savings, and possible deferral of capital gains — either as a fixed annuity or a variable unitrust payment.

Charitable Lead Trusts

The reverse structure: the EDF receives income from the trust for a term of years, after which the remaining principal passes to your family — often at significantly reduced gift and estate tax cost. This can be an efficient way to support the EDF now while still providing for the next generation.

Endowed Giving

An endowment is a gift that establishes a perpetual fund, with only the investment earnings distributed each year toward a purpose you designate — a collection, an award, a named program. It is one of the most lasting ways to make your generosity part of the permanent story of magic.

Giving Through Membership Renewal

Each year, your I.B.M. membership renewal includes a simple option to add a contribution to the Endowment Fund — an easy, recurring way to support the future of magic.

A note on tax and estate planning. Wills, trusts, and the tax treatment of charitable gifts are governed by federal and state law that changes over time. The EDF and its trustees do not provide legal or tax advice. Please consult your own attorney and financial advisor for guidance based on current law before finalizing any planned gift.

Meet the Board of Trustees

The EDF is governed by three lifelong I.B.M. members who volunteer their time and expertise to steward the Fund.

William E. Evans

TRUSTEE · WEVANS@CECB.COM

A member of the I.B.M. since 1978 (Order of Merlin-Shield), Bill served as International President and continues to serve as the organization's Legal Advisor. A tax attorney and Fellow of the American College of Tax Counsel, he has served on the Board of Trustees, the Audit Committee, the Ethics Committee, and chairs the Grievance Committee. Away from magic, Bill is a musician who has performed with The M-Dock Band for more than two decades.

Rolando Santos

TRUSTEE · ROLANDO@ROLANDOSANTOS.COM

An I.B.M. Medallion of Honor recipient — the highest honor the I.B.M. bestows — and a past International President, Rolando is a lifetime I.B.M. member since 1995. He has chaired the Ethics Committee and the Management Team, and is a longtime member of Ring 9 in Atlanta, where he was named Atlanta Magician of the Year. A contributor and Assistant Editor for The Linking Ring since 1996, he is also a member of the Society of American Magicians, The Magic Circle (Inner Magic Circle with Gold Star), and the creator of “The Why Grid,” a widely referenced tool for improving magic routines. Outside of magic, Rolando built a long career in international broadcast journalism.

Shawn Farquhar

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A lifetime I.B.M. member since 1981 (Order of Merlin-Shield) and a past International President, Shawn is the only performer to win both Stage and Close-Up championships in I.B.M. competition. A professional magician and multiple-term president of the Pacific Coast Association of Magicians, he is also a Life Member of the Society of American Magicians, the Academy of Magical Arts, and The Magic Circle (Inner Magic Circle with Gold Star). Shawn owns Palmer Magic and Hidden Wonders Speakeasy Magic Experience, and is active in youth mentorship through Magician U.

Frequently Asked Questions

Is the EDF part of the I.B.M.?

The EDF is the independent charitable foundation connected to the International Brotherhood of Magicians. It operates under its own Board of Trustees and exists to fund charitable and educational work that furthers the I.B.M.'s mission.

How are funds managed?

The Board of Trustees oversees the Fund's investments and grantmaking, directing donations toward the programs and initiatives outlined in this guide.

Can I designate my gift to a specific purpose?

Yes. Many donors choose to support a specific program, such as the Teen Seminar or Honor Ring grants, or to establish a named endowment. Contact the Trustees to discuss designating your gift.

Are gifts to the EDF tax deductible?

Gifts to the EDF are generally tax deductible as charitable contributions; specific benefits depend on the type of gift and your individual tax situation. Please consult your tax advisor for guidance.

Can my Ring apply for support?

Yes. Rings may apply for Honor Ring recognition or submit a grant proposal for an educational project at any time. See the Grant Application Guidelines in this guide.

How do I establish an endowment?

Reach out to the Board of Trustees to discuss your goals. Because endowments are designed to last in perpetuity, the Trustees will work with you and your attorney to make sure the language matches your intent.

Contact the Trustees

Investing in the Future of Magic starts with a conversation.

Whether you're exploring a first gift, applying for a grant, nominating your Ring for Honor Ring status, or planning a legacy gift, the Board of Trustees is glad to help.

GRANT & PROGRAM INQUIRIES

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The I.B.M. Endowment & Development Fund and its representatives do not provide legal or tax advisory services. This guide is intended for general informational purposes only; please consult your own legal and financial advisors regarding your specific circumstances.