



NEW CANAAN
COMMUNITY
FOUNDATION

Agency Endowment Fund Management Services

An *Agency Endowment Fund* is a simple and effective way to build income and long term financial stability for your nonprofit organization.

Your fund is invested with the Community Foundation's endowed assets. The Foundation's economies of scale provide your organization the benefit of a diverse investment portfolio that typically only comes with large funds.

"We chose the Foundation to manage our endowment so that we can put on excellent shows and know that our investments are in the best possible place."

Bob Doran, President
Town Players of New Canaan



Why Start an Agency Fund?

- Perpetuate the intention of your long-term capital endowment.
- Delegate fiduciary responsibility to the Community Foundation and take advantage of our professional management services and investment expertise.
- Increase your ability to attract gifts with the establishment of an official fund.

How it works:

- Your organization's Board determines how much to invest.
- We work with your Board to develop a fund agreement that meets the needs and vision of the organization.
- We send quarterly statements reporting the fund activity.
- We handle the administrative details — including investment management, acknowledgements and reporting, allowing more time to concentrate on your mission.
- Distributions are made to your organization when needed.