



# agency endowment fund management services

## what is an agency endowment fund?

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.

## why start an agency endowment 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.

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