



Agency fund

BUILD A STABLE SOURCE OF CAPITAL TO SUPPORT YOUR ORGANIZATION'S MISSION

Agency funds are established by nonprofit organizations so they can create a lasting source of capital to support their mission now and in the future. Nonprofits can take advantage of the Foundation's investment management and gift planning expertise — and the administrative ease of having the Foundation distribute funds and manage record-keeping and tax reporting.

With an agency fund, you can:

- Provide a stable and ongoing source of capital for your organization, forever.
- Have your fund managed by the Foundation's team of professional investment managers, so you know your organization's endowment is invested wisely.
- Give a variety of assets — cash, appreciated securities, real estate or other assets — and take advantage of the Foundation's expertise in managing complex gifts for charitable purposes.
- Rely on the Foundation to administer the fund, making annual disbursements and managing record-keeping and tax reporting.
- Grow charitable resources over time, as investment returns are folded back into your fund to sustain your organization in the future.
- Ensure that your resources will continue to serve the mission forever. If your organization ceases operations, the Foundation is bound to find another nonprofit in good standing doing similar work to become the beneficiary of your fund.

Each year, grant distributions will be made from the fund using the Foundation's charitable disbursement rate.

The minimum contribution to establish an agency fund is \$25,000.

Ready to simplify your organization's endowment management? Let's get started.

Please be in touch to discuss how we can help your organization create a lasting source of capital for the future.

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