



## FUND OVERVIEW

# Nonprofit Agency Endowment Fund

Establishing a nonprofit agency endowment fund with Branch County Community Foundation is a simple and efficient way to create a source of permanent capital for your organization's future. These funds offer a reliable, ongoing source of financial support.

Your organization receives the added benefit of our expertise in helping you develop planned giving programs and facilitate complex gifts from your donors. We handle the investment management of the fund and all administrative details, including gift processing, record keeping, tax reporting and audits.

## HOW IT WORKS



GIVE TO YOUR FUND



INVEST FOR GROWTH



GRANTS TO NONPROFITS

- Your board determines how much to invest long-term.
- Your organization works with our professional staff to complete a fund agreement.
- We set up a special fund in the name of your nonprofit organization.
- Your nonprofit organization receives regular statements on the fund.
- You can add to the fund at any time.
- You can request annual distributions from the fund or you can save up the available dollars for a large expense in the future.

## DEVELOPING PERMANENCE

Dress to Work helps individuals transition out of underemployment by providing career training, mentoring and professional attire. Like many nonprofits, it struggles to cover operating expenses. Over the years, several of its volunteers have offered to contribute gifts of appreciated stock or real estate, but Dress to Work did not have the ability or expertise to accept those types of gifts. Executive Director Jenny Pike said, "We simply didn't have the sophistication to handle some kinds of gifts. It was so frustrating to turn away willing donors." As a result of establishing the Dress to Work Designated Fund at its local community foundation, the organization has added the ability to accept large and complex gifts. Plus, it was able to develop a planned giving program and a permanent endowment, providing a regular stream of support and leaving the management and reporting to the community foundation.

# 10 REASONS TO GIVE THROUGH THE COMMUNITY FOUNDATION

- 1 We are a **local organization** with deep roots in the community
- 2 We have **broad expertise** regarding community issues and needs.
- 3 We provide highly **personalized service** tailored to each individual's charitable and financial interests.
- 4 Our funds help people **invest in the causes** they care about most.
- 5 We accept a wide **variety of assets** and can facilitate even the most complex forms of giving.
- 6 We partner with **professional advisors** to create highly effective approaches to charitable giving.
- 7 We offer maximum **tax advantages** for most gifts under state and federal law.
- 8 We **multiply the impact** of gift dollars by pooling them with other gifts and grants.
- 9 We build **endowment funds** that benefit the community for decades and help create personal legacies.
- 10 We are a **community leader**, coordinating collaborative resources to create positive change.

## FUND OVERVIEW NONPROFIT AGENCY ENDOWMENT FUND

- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift—and all future earnings from your gift—is a permanent source of community capital, helping to do good work forever.

### OTHER ADVANTAGES

A nonprofit agency endowment fund is a simple way for your nonprofit organization to plan for a stable and secure future. Your donors can be sure that the endowed fund's principal will not be spent and can grow over time, providing a source of lasting support. The community foundation's economies of scale provide your organization with the benefits of a diverse investment portfolio with low investment fees that typically come only with very large funds.

Your organization's regular donors can leave a bequest through the community foundation to benefit your organization forever and create a personal legacy. The community foundation can facilitate even the most complex planned gifts or gifts of appreciated stock or real estate. We handle investment management and the administrative responsibilities related to endowment so that your organization's staff and volunteer hours are concentrated on fulfilling your mission.

### LET'S CONNECT

Contact us to learn more about the ways we can help you have a positive impact on the community and causes you care about.



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