

# Endowing your nonprofit organization



## AGENCY ENDOWMENT FUND

**Establishing an Agency Endowment Fund** *at your community foundation is a simple and efficient way to build an income for your nonprofit organization. Our experienced staff can help you develop planned giving programs and assist with investment management and administrative details.*

### How it works

- Your board determines how much you would like 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.
- We handle all the administrative details – including investment management and help in specifying grant disbursements – so that your organization puts assets where they're needed.
- 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.

### Developing permanence

Dress to Work helps low income 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 says, "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 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.

**For more information visit**  
[www.communityfoundationorillia.ca](http://www.communityfoundationorillia.ca)



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## Designated Fund – For Your Nonprofit Organization

### Ten reasons people choose community foundations.

#### one

We are a **local organization** with deep roots in the community, and part of a nationwide movement whose support we build and share.

#### two

We bring donors to the table as **community builders**, working closely with them to align their philanthropic vision with the community's needs.

#### three

We identify **long-term needs** and opportunities and invest in solutions that let our communities guide their own future.

#### four

We take a broad and inclusive view of what a community is, and **provide grants** to the widest possible range of organizations and initiatives.

#### five

We provide highly **personal and flexible service**, accepting a wide variety of assets and offering donors maximum tax advantage.

#### six

We build **permanent funds** and those that can respond to immediate needs, helping our communities ensure vital futures.

#### seven

We **multiply the impact** of gift dollars by pooling them with other gifts.

#### eight

We believe that diversity is strength, so we **bring the entire community together** to stimulate new ideas, build participation and strengthen community philanthropy.

#### nine

We are **transparent and reputable stewards** of community resources, committed to being accountable, accessible and responsive.

#### ten

We build **community vitality** – the unique and essential spirit that flourishes when people believe their community holds possibilities for everyone.

### More benefits

An agency endowment fund is a safe and simple way for your nonprofit organization to establish its own endowment. 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. And the community foundation's economies of scale provide your organization with the benefits of a diverse investment portfolio and 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 create a personal legacy and benefit your organization forever. 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.



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all for community.



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Community means so many things to so many people and the world to us. In all we do, and all we say, we are all for community.

We are part of Canada's community foundation movement, represented by more than 160 community foundations from coast to coast.

Community vitality has been our purpose, promise and passion since 1921, when we began connecting donors to community needs and opportunities.

Together, we help Canadians invest in building strong and resilient places to live, work and play.