For decades, the Community Foundation has been helping nonprofit organizations, schools and religious institutions establish and maintain permanent endowment funds to support them in the long term. In fact, the Foundation is a community expert in endowments, with more than 35 years of experience and over $110 million in endowed assets.

Because forward looking leaders chose to establish endowments for the agencies they cared about, over 75 organizations receive approximately $3.4 million annually to use for operations or to reinvest. They enjoy the benefits of a dedicated and growing source of annual support without the burdens of asset management.

CONSIDER an Organizational Endowment If:

- Your organization is a nonprofit with an IRS 501 (c)(3) status
- You want to support the growth and stability of your organization
- You want to demonstrate security and vision to leverage your current funding opportunities
- You are eager to increase investment efficiencies by pooling your funds and lowering your fees
- You seek a relatively constant source of annual income
- You aspire to build your endowment through planned gifts and estate planning strategies
BENEFITS of establishing an organizational endowment at the Community Foundation:

- Your endowment will be invested within a long-term Investment Pool, benefiting from professional investment management and economies of scale, creating greater opportunity for growth and earnings at a reduced cost.
- Your endowment makes a distribution to your organization annually, providing a permanent income stream that can be distributed or reinvested.
- Our knowledgeable staff can process gifts quickly and conveniently; this may be especially important for accepting year-end contributions.
- We accept stock, real estate, and other non-cash contributions, and may accept planned or deferred gifts.
- We offer annual presentations to your board and support on planned giving activities.
- Our Board of Directors and Investment Committee provide continuous oversight.
- We handle all the accounting and financial reporting on your behalf.
- An endowment at the Community Foundation gives your donors greater confidence in the long-term health of the organization.
- You receive timely quarterly financial reports and have access to consultations with our investment consultant.

RETURN ON INVESTMENT*

15.9%  6.5%  8.6%  6.0%

1 YEAR  3 YEAR  5 YEAR  10 YEAR

*Actual investment returns as of December 31, 2017.

FEES & MINIMUMS

Annual Administration Fee
(Minimum fee of $300 per year):

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>.75%</td>
<td>on the first $1 million of the balance of the fund</td>
</tr>
<tr>
<td>.50%</td>
<td>on the next $9 million of the balance of the fund</td>
</tr>
<tr>
<td>.40%</td>
<td>on the remaining balance of the fund</td>
</tr>
</tbody>
</table>

Your organization can establish an endowment at the Community Foundation with as little as $25,000.

Establishing the endowment is as simple as completing a fund agreement; no filing with tax or other authorities is required.

For more information, contact:

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