## Organization Funds

Establishing a Organization Fund for the benefit of your nonprofit is a simple and efficient way for you to increase the income available to your agency. Our experienced team will provide investment expetise and assist with administrative details, giving you the opportunity to concentrate on your organization's mission.

## **HOW IT WORKS**



Your organization transfers assets valued at \$10,000 or more to us.



Your organization or its donors make additional gifts to the fund.



Your organization increases the income available to the agency through investment returns.

## Benefits

An Organization
Fund is a safe and
simple way for your
nonprofit organization
to establish an
endowment that
can grow over time
providing a source
of lasting support.
Our economies of
scale provide your
organization the
benefits of a diverse

investment portfolio and low investment fees that typically come only with very large funds.

Your organization's donors can leave a bequest through the Community Foundation to benefit your organization forever and create

a personal legacy.
Donors receive tax
benefits each time a
gift is given. We can
facilitate even the most
complex planned gifts.

Our staff is available to help you as you work with donors to make gifts of securities, qualified retirement plans, life insurance, real estate and other

We handle investment management and the administrative responsibilities so you can concentrate on fulfilling your mission. We will also provide you with quarterly fund statements.

