Agency Funds: Grow Your Mission

**WHAT IS AN AGENCY FUND?**
Many nonprofit and public agencies choose Stanislaus Community Foundation as a partner to house their charitable funds. The Foundation manages both investments and fund administration, providing agencies the freedom to focus and grow their own mission.

**AGENCY FUND FAQS**

**HOW DO I START AN AGENCY FUND?**
A minimum of $10,000 is required to begin a fund. Our fund agreement is a simple document that outlines our relationship and requires at least two signees from your organization.

**WHAT IS THE COST TO MY AGENCY?**
We charge an annual minimal administrative fee based on assets. The fee supports ongoing administration of charitable funds.

**WHEN CAN WE WITHDRAW DISTRIBUTIONS FROM THE FUND?**
You may choose to receive distributions from your agency funds as often as you’d like – or not at all. No annual distributions are required.

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**“Partnering with the Stanislaus Community Foundation was an easy choice as their mission aligns with our own. Like Community Hospice, the Foundation is dedicated to making a positive measurable change in our community and are invested in enhancing quality of life for the residents of Stanislaus County.”**

— C. DESHA MCLEOD
President & CEO, Community Hospice

“UCP of Stanislaus County believes in the benefit of collaboration. Building strong community connections adds value to the services UCP provides the developmentally disabled population in Stanislaus County. This is a relationship over the long-term, that will add tremendous value not only monetarily but also through building positive and impactful relationships.”

— KEENON KRICK
Executive Director, United Cerebral Palsy of Stanislaus County

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**How to Start a Fund**

**The Process**

1. **FIND YOUR PASSION**
   - Education, environment, arts, health services... from the highly specific to simply “general charitable purposes,” whatever you care about, we can help.

2. **ALIGN YOUR PASSION TO A SPECIFIC FUND TYPE**
   - We offer a number of fund options, and our staff is happy to advise you on the advantages of each fund type (see next page).

3. **COMPLETE A SIMPLE FUND AGREEMENT**
   - We provide a simple agreement that spells out the parameters of the fund, identifies any successors and covers all legal and accounting requirements.

4. **NAME YOUR FUND**
   - After completing a simple fund agreement, choose a name that identifies you, your family, your corporation or cause. It’s entirely up to you. You may also choose to remain anonymous.

5. **ACTIVATE YOUR FUND WITH AN INITIAL GIFT**
   - We offer multiple giving options and can accept a variety of assets, including cash, stock, real estate, bequests and retirement plans, among others.

6. **INVESTMENT IMPACT**
   - Stanislaus Community Foundation invest all assets into a common pool so contributions are leveraged for maximum impact. Our five-year rate of return on investments is 8%.

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**Once you establish your fund, you may:**

- Add money to the fund at any time, in any dollar amount.
- Utilize our online system to manage your account.
- Specify how grant disbursements should be acknowledged. You may make grants using your fund name or you may remain anonymous.
- Make grants to any nonprofit organization in the United States.