



Community Foundation of Louisville

AGENCY ENDOWMENT FUND

What is an Agency Endowment Fund?

An endowment at the Community Foundation provides stability, planned growth and credibility for local nonprofit agencies. Through a nonprofit Agency Endowment Fund, charities can set aside funds for special programming, security against unforeseen hurdles, or as an investment strategy. It enables a nonprofit to focus on its core mission, while the Community Foundation provides a perpetual source of financial support.

Getting Started is Easy

A Nonprofit Agency Endowment Fund protects the capital of an organization and helps to meet future needs. It can also provide a relatively steady stream of income and can demonstrate security and long-term financial planning. You can use cash, stock, or other assets to create a named fund. It takes a minimum of \$25,000 to start an Agency Endowment Fund.

Key Benefits

Easy: With an Agency Fund at the Community Foundation, your organization is relieved from having to oversee and manage a permanent endowment fund. You get the benefit of our investment expertise and a steady stream of income in perpetuity.

Flexible: Additions can be made to your fund anytime and you have online access to your fund seven days a week, 24 hours a day. The Community Foundation can accept gifts of many types of assets, including stock, real property, and closely-held assets.

Personal: Your fund is designed to meet your organization's goals, whether that's long-range savings or funding for specific, mission-oriented events, scholarships, or programs.

Efficient: We handle the administrative tasks of philanthropy—from keeping track of your gifts to acknowledgement letters and sending you quarterly statements of activity—all for a nominal support fee.

How Do I Get Started?

It's easy! Contact our Philanthropic Services Team at **502.585.4649** or **stewardship@cflouisville.org**. We'll work with you to create a customized charitable Fund that carries out your unique philanthropic goals.

You can also find more information on our website, **www.cflouisville.org**.

Consider A Nonprofit Agency Endowment Fund If You:

- Represent an organization with an IRS 501(c)(3) status.
- Want to support the growth and stability of your organization.
- Seek to demonstrate security and vision to leverage current funding opportunities for your nonprofit organization.
- Are eager to increase investment efficiencies. Funds at the Community Foundation are pooled to receive maximum return and lower fees.
- Seek a relatively constant source of annual income.