

Endowing your non-profit organization

Agency Endowment Fund



Entrusting your charitable endowment to us is cost effective, can ease your workload, and is part of a strong organizational sustainability plan. Many registered charities look to their community Foundation as the vehicle of choice to hold and manage their endowment in perpetuity.

How it works

- Once the decision is made to establish an endowment, your organization works with us to complete a fund agreement and establish a fund (minimums apply).
- We set up a special fund in the name of your non-profit organization.
- Your non-profit organization receives annual statements on the fund.
- You can add to the fund at any time.
- We handle the administration — including professional investment management services — so that your organization can focus on its core purpose. We charge a modest fee for investment, accounting, and administrative services.
- Annually, the Foundation directs income to your charitable organization for its unrestricted use.
- Should your organization cease to exist, we'll direct the income from your established fund to other charitable organizations with similar missions.

Developing permanence

Dress to Work helps low-income individuals transition out of underemployment by providing career training, mentoring, and professional attire. Like many non-profits, 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.



Ten reasons people choose to give through community foundations

one

We are a **local organization** with deep roots in the community.

two

Our staff and volunteers have **broad expertise** regarding community issues and needs.

three

We provide highly **personalized service** tailored to each individual's charitable and financial interests.

four

Our funds help people **invest in the causes** they care about most.

five

We accept a wide **variety of assets**, and can facilitate even the most complex forms of giving.

six

We partner with **professional advisors** to create highly effective approaches to charitable giving.

seven

We offer maximum **tax advantage** for most gifts under federal law.

eight

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

nine

We build **endowment funds** that benefit the community forever and help create personal legacies.

ten

We are a **community leader**, fostering collaboration on issues of broad interest to create positive change.

More benefits

An agency endowment fund is a safe and simple way for your non-profit organization to establish its own permanent 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 Guelph 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.

** Note: all gifts are given irrevocably and become a permanent asset of the Guelph Community Foundation.*

Your organization's regular donors can leave a bequest through The Guelph Community Foundation to create a personal legacy and benefit your organization forever. The Guelph Community Foundation can facilitate a wide variety of gifts. 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.

Community foundations provide a simple, powerful, and highly personal approach to giving. We offer a variety of giving tools to help people achieve their charitable goals.