



Community Giving
FOUNDATION™

Agency Endowment Funds



Establishing an **Agency Endowment Fund** at the Foundation is a simple and efficient way to create a permanent source of financial support for your organization's future. These funds are restricted for the benefit of a designated 501(c)(3) nonprofit organization or government entity. Grants are made to the nonprofit ("agency") annually to support its mission and invest in its future sustainability. Agency Endowment Funds can be created by the organization itself or by a donor in partnership with the organization.

Equipping Local Leaders

Leadership
Susquehanna Valley is a nonprofit that provides education and programming to build and strengthen skill sets for emerging and established leaders in the Susquehanna Valley region. The organization established an agency endowment fund for financial stability and to help grow its programs through scholarships for young professionals, small businessowners, and nonprofit leaders.

How It Works

- Your organization/board determines how much to invest long-term.
- You work with the Foundation to complete a fund agreement for the fund in your organization's name.
- Your organization and the general public can give additional donations to the fund at any time.
- The annual distribution from your fund can be requested each year or left in the fund to be invested.



FEES:

Administrative Fee = 1.5%
Investment Fee = 0.41%

SPENDING POLICY:

Spending Policy = 4.5%

(This determines the annual distribution amount to the agency.)

DISTRIBUTION (grant):

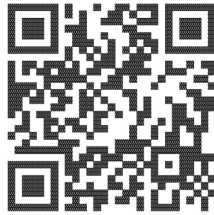
Annually during the first quarter, the Foundation will correspond with the fund representative regarding the fund's available distribution.

FUND BALANCE:

Agency Endowment Funds begin grantmaking when the fund balance reaches \$10,000. But you can start a fund for as little as \$500 with a plan to reach \$10,000 within five years.

Foundation Fundholder Benefits

- Foundation will work with you on publicity to tell your community giving story and promote your new fund.
- An online donation option is created for your fund so the community can help it grow.
- You receive access to the Foundation's Advisor Portal, an online system that gives you access to data about your fund (like donations received, grants awarded, semi-annual fund statements, and other updates).
- Foundation staff stay in communication with fundholders throughout the year and host several events annually to celebrate community giving.



Learn more about creating your giving story. Scan the QR code for our Giving Workbook.

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An Agency Endowment Fund is a simple way for your organization to plan for a stable and secure future. Through a diverse investment portfolio, your fund will grow over time, providing a source of lasting support. The Foundation can facilitate a wide range of gift types and planned gifts. Donors can leave a bequest through the Foundation to benefit your organization forever and create a personal legacy. The Foundation will handle the administrative tasks so your organization can focus on fulfilling your mission.



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