

## Benefits of Establishing An Organizational Fund

**Fulfillment of Required Fiduciary Responsibilities** - Nonprofit organizations have fiduciary responsibilities that go far beyond choosing an investment manager. We provide a consistent and high-quality level of oversight that is very difficult for smaller organizations to perform themselves. By providing these comprehensive services, we help local nonprofit organizations focus on their core mission, rather than attempting to duplicate the investment oversight process on a small scale at inordinate cost. These fiduciary responsibilities include:

- A written investment policy specifying the key elements of investment strategy and prudent management
- A governance structure that emphasizes accountability and due diligence, employing a system of checks and balances to ensure that policies are in force and properly executed
- A knowledgeable and experienced Investment Advisory Committee of independent professionals
- A written conflict-of-interest policy, renewed annually
- Independent investment consultants who monitor and analyze the performance and actions of investment managers and custodians
- Managers for each asset class selected for their long-term stability and performance record
- Oversight by a knowledgeable and respected Board of Directors
- Experienced staff dedicated to excellence in investment oversight and donor services

**Trusted Investment and Asset Management** - Because we pool the assets of the 450+ component funds we manage for investment purposes, we attract top financial managers at competitive rates. As our assets grow, investment management fees typically drop, directly benefiting your fund. Additional services include:

- Credibility of having your funds managed by a known institution with a strong financial track record; demonstrates planning for your organization's long-term financial stability
- Investment options to match the goals of your fund
- Quarterly financial statements

**Major and Planned Gift Expertise** - We can help to supplement your development efforts, particularly with major gifts involving complex assets and planned gifts. Services include:

- Our development staff available to meet with your donors about a large gift to your fund
- Help with complex gifts of stock, property and other assets to your fund
- Planned giving support (financial projections customized for your prospective planned giving donors and free consultation with a planned giving professional)

**Marketing/Public Relations Support** - You gain visibility for your fund and organization in our community and among Community Foundation donors and friends through these services:

- Content support to assist you to create a brochure that promotes your fund
- Periodic seminars: e.g., How to Promote Your Fund, Raising Endowment Funds
- Assistance drafting fund-related press releases and getting media attention
- Opportunity to be featured in our Annual Report, donor circle, or donor site visit
- Links on our web site to your organization
- Invitation to our Annual Celebration and other social events

**Administrative Support** - We handle paperwork for you, including:

- Acknowledgement of contributions directly to donors for tax purposes
- Close communication with you regarding donors' gifts so you can thank them
- Timely processing of your request for a distribution from your fund