

# Agency Funds

## Giving through the Community Foundation

Establishing an **Agency Endowment Fund** with us is a simple and efficient way to build an ongoing source of income for your charitable organization. A minimum gift of \$10,000 is required for an Endowment Fund. A gift of \$1,000 can start a Future Fund.

### Giving Assistance

- We can facilitate planned giving discussions with your donors to create trusts and bequests in wills.
- The Foundation can accept sophisticated gifts of stock, real estate, life insurance and personal property.
- We offer charitable gift annuities.

### Professional Investment Management

- We seek investment returns sufficient to support an annual distribution of up to 4.5% of the fund assets to your organization.
- The Foundation has a diversified asset allocation strategy.
- We offer managers experienced in specialized sectors of the markets.
- Modest administrative fees.

### Here to Help!

- Contact us to get started! 920-830-1290 or [info@cfoxvalley.org](mailto:info@cfoxvalley.org)
- We also offer convenient online access to your fund.



### Giving away clothes on a shoestring

The Community Clothes Closet gives away more than 100,000 pieces of clothing per year to people in need, but it operates on a shoestring. Survival on a tight budget works, if you can handle surprises. The Clothes Closet has an agency fund within the Community Foundation to even out bumps in costs and revenues. Annual distributions of 4.5% of the fund's total assets, keep its budget fashionably in the black.

For more stories of giving:  
[cfoxvalley.org/stories](http://cfoxvalley.org/stories)



4455 W. Lawrence Street • Appleton, WI 54914  
Phone: 920.830.1290 • Fax: 920.830.1293  
[info@cfoxvalley.org](mailto:info@cfoxvalley.org) • [www.cfoxvalley.org](http://www.cfoxvalley.org)