

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
- 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.

Read more stories of giving:
cfoxvalley.org/stories