

AGENCY FUNDS

A permanent resource for your organization




A PERMANENT RESOURCE FOR YOUR ORGANIZATION. *An agency endowment or stewardship fund is an easy way for your nonprofit organization to establish an endowment, eliminate the administrative burden, and increase your ability to handle large and complex gifts. Your agency fund benefits for participation in the Community Foundation of North Central Florida's investment pool while our experienced staff helps develop planned giving programs and assists with administrative details.*

TWO OPTIONS FOR AGENCY FUNDS:

- **Endowment Funds** – a permanent resource for your organization, producing a steady stream of income annually while being invest for the long-term
- **Stewardship Funds** – Take advantage of our investment expertise and accept complex gifts and planned gifts, while allowing your organization to withdraw money at any time.

THE GROWTH OF ENDOWED FUNDS.

YEAR 1	YEAR 25	YEAR 50
Establish your Family Fund \$100,000 gift	\$186,000 in cumulative grants and services \$190,000 balance	\$541,000 in cumulative grants and services \$360,000 balance
		
Initial gift has grown and paid out:	 4 TIMES	 9 TIMES

Agency Funds at the Community Foundation

Alachua Conservation Trust
Alachua County Humane Society
Boys and Girls Club
Dance Alive Forever
Doris Bardon Endowment
Einstein School
Florida Commission on the Status of Women
Gainesville Civic Chorus
Gainesville Fine Arts Association
Girls Place-Raise the Roof
GRACE
Guardian Foundation
Historic Melrose
Jungle Friends Primate Sanctuary
Junior Achievement
Matheson Museum
Melrose Library Association
Meridian Behavioral Healthcare
Fisher House Endowment
Operation Catnip
Reichert House Endowment
The Education Foundation of Alachua County
United Way of North Central Florida



COMMUNITY FOUNDATION
of North Central Florida

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HOW IT WORKS:

- Your board works with our staff to determine the type of fund needed and how much you would like to place in the fund being your organization's name.
- The agency or individual donors can add to the fund at any time.
- We handle all the administrative details – including investment management. You have 24/7 online access to fund activity and statements.
- The fund is placed in the CFNCF's investment pool, providing the benefits of a diverse investment portfolio and low investment fees that typically come only with very large funds.

BENEFITS OF AN AGENCY FUND.

- With a stewardship fund, you can access any amount of the fund balance at any time with a $\frac{3}{4}$ vote by your board of directors.
- With an endowed fund, your donors can be sure that the fund's principal will not be spent and can grow over time, providing a source of lasting support.
- Your donors can leave a bequest through the CFNCF to benefit your organization forever and create a personal legacy. CFNCF staff can facilitate even the most complex planned gifts, including gifts of appreciated stock or real estate.
- We handle investment management and the administrative responsibilities so that you can concentrate on fulfilling your mission.

ABOUT THE COMMUNITY FOUNDATION OF NORTH CENTRAL FLORIDA. Our Community Foundation was established in 1998 and serves North Central Florida by promoting and sustaining local philanthropy. We currently manage more than \$21 million in 100 charitable funds and oversee the distribution of \$3 million in grants annually. We also have secured more than \$12 million in planned gifts benefitting local organizations for years to come.

Ten reasons to give through your community foundation

- 1 We are a **local organization** with deep roots in the community.
- 2 We have **broad expertise** on community issues and needs.
- 3 We provide highly **personalized service** tailored to your charitable and financial interests.
- 4 Our funds help people **invest in the causes** they care about most.
- 5 We accept a wide **variety of assets**, and can facilitate even the most complex forms of giving.
- 6 We partner with **professional advisors** to create highly effective approaches to charitable giving.
- 7 We offer maximum **tax advantage** for most gifts under state and federal law.
- 8 We **multiply the impact** of gift dollars by pooling them with other gifts and grants.
- 9 We build **endowment funds** that benefit the community forever and help create personal legacies.
- 10 We are a collaborative **community leader**, coordinating resources to create positive change.