

Endowing your nonprofit organization



AGENCY ENDOWMENT FUND

Establishing an Agency Endowment Fund at your community foundation is a simple and efficient way to build an income for your nonprofit organization. Our experienced staff can help you develop planned giving programs and assist with investment management and administrative details.

How it works

- Your board determines how much you would like to invest long term.
- Your organization works with our professional staff to complete a fund agreement.
- We set up a special fund in the name of your nonprofit organization.
- Your nonprofit organization receives regular statements on the fund.
- You can add to the fund at any time.
- We handle all the administrative details – including investment management and help in specifying grant disbursements – so that your organization puts assets where they're needed.
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift – and all future earnings from your gift – is a permanent source of community capital, helping to do good work forever.

More Benefits

An agency endowment fund is a safe and simple way for your nonprofit organization to establish its own endowment. Your donors can be sure that the endowed fund's principal will not be spent and can grow over time, providing a source of lasting support. And the community foundation's economies of scale provide your organization with the benefits of a diverse investment portfolio and low investment fees that typically come only with very large funds.

Your organization's regular donors can leave a bequest through the community foundation to create a personal legacy and benefit your organization forever. The community foundation can facilitate even the most complex planned gifts or gifts of appreciated stock or real estate. We handle investment management and the administrative responsibilities related to endowment so that your organization's staff and volunteer hours are concentrated on fulfilling your mission.



**CAMPBELLFORD/SEYMOUR
COMMUNITY FOUNDATION**
Growing Our Community
www.cscf.ca

One of nearly 200 Community
Foundations in Canada



**COMMUNITY
FOUNDATIONS
OF CANADA**
all for community.



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The Power of Endowments

Campbellford/Seymour Community Foundation – Our Story

Ten reasons people choose Community Foundations.

one

We are a **local organization** with deep roots in the community, and part of a nationwide movement whose support we build and share.

two

We bring donors to the table as **community builders**, working closely with them to align their philanthropic vision with the community's needs.

three

We identify **long-term needs** and opportunities and invest in solutions that let our communities guide their own future.

four

We take a broad and inclusive view of what a community is, and **provide grants** to the widest possible range of organizations and initiatives.

five

We provide highly **personal and flexible service**, accepting a wide variety of assets and offering donors maximum tax advantage.

six

We build **permanent funds** and those that can respond to immediate needs, helping our communities ensure vital futures.

seven

We **multiply the impact** of gift dollars by pooling them with other gifts.

eight

We believe that diversity is strength, so we **bring the entire community together** to stimulate new ideas, build participation and strengthen community philanthropy.

nine

We are **transparent and reputable stewards** of community resources, committed to being accountable, accessible and responsive.

ten

We build **community vitality** – the unique and essential spirit that flourishes when people believe their community holds possibilities for everyone.

- Established in 2001
- \$6.2 Million from the Sale of our community's 100 Year Old Public Utility
- Forward thinking members of the Community worked with local Council representatives to discuss and ultimately establish the creation of a local Community Foundation
- The Community Foundation has provided over \$3.7 Million in Grant funding to Registered Charitable Organizations, generally within Campbellford/Seymour
- We have operated the Community Foundation for 15 years with one full-time and one part-time staff and own our own office building as an alternative investment
- As of December 31, 2017, Assets of \$6.7 Million
- Please visit www.cscf.ca for more information!

Campbellford/Seymour Community Foundation Investment Management Fees and minimums to establish an endowment fund:

- Investment and Management Fees: 1.00% – 2.00% as approved by the Board of Directors
- Minimum of \$5,000.00 to set up a fund



TORONTO
FOUNDATION

Investment Returns as of March 31, 2017

Timeframe	Toronto Foundation Portfolio
1-Year	10.6%
5-Year	10.1%
10-year	6.3%

Target: a real return of 5% + Canadian CPI over a rolling 5 year period