



# Agency Endowment Funds

**Agency Endowment Funds** provide an exemplary service tailored to the needs and capacity of your nonprofit organization.



**Springfield Foundation**

For good. For ever. For all.®

Your organization's endowment fund represents your future and the resources to support, enhance, and expand the services you provide to impact and improve our community. Our goal is to help your organization build its Endowment Fund.

## Key Benefits

- Notify your organization of all gifts to your endowment fund.
- Issue quarterly fund statements detailing investment status and asset allocation.
- Provide an annual review of fund investment performance.
- Distribute assets to your organization or another public charity pursuant to terms of the letter of transmittal.
- Process all direct gifts to your endowment fund.
- Acknowledge all direct gifts to the donor, regardless of the size of the gift.
- Consultation with your donors, their professional advisors, and your staff to discuss planned and current gifting vehicles.
- Presentations to your donors, board, or staff on a variety of endowment-related topics.
- Charitable gift annuity program available to your organization's donors.
- Technical competence in negotiating and completing gifts of assets such as cash, appreciated securities, closely-held stock, real estate, life insurance, IRAs and retirement plans, charitable lead and remainder trusts, and bequests.

The Springfield Foundation is a trusted philanthropic partner to individuals, families, and businesses, who have created charitable funds and planned gifts. These funds and gifts make a difference in the lives of others through the most effective philanthropy possible. Serving the Clark County for more than 75 years, the Springfield Foundation is the 15th largest community foundation in Ohio.

## We're Here to Help!

Learn more about the Springfield Foundation and Agency Endowment Funds by visiting our website at [www.springfieldfoundation.org](http://www.springfieldfoundation.org). To set up a fund or for more information, contact our Director of Development at 937-324-8773 or [sarah@springfieldfoundation.org](mailto:sarah@springfieldfoundation.org).