

Agency Endowment Funds

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

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 Fund Agreement.
- » Process all direct gifts to your endowment fund.
- » Acknowledge all direct gifts to the donor regardless of the size of the gift.
- » Consult with your donors, their professional advisors, and your staff to discuss planned and current gifting vehicles.
- » Make presentations to your donors, board, or staff on a variety of endowment-related topics.
- » Make the Charitable Gift Annuity program available to your organization's donors.
- » Offer 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.
- » Co-invest funds in a diversified investment pool.

About the Champaign Foundation

The Champaign 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.

We're Here to Help!

Learn more about The Champaign Foundation and Agency Endowment Funds by visiting us online at champaignfoundation.org. Please contact our Director of Development by calling 937-324-8773 or emailing victoria@champaignfoundation.org.

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