

BENEFITS OF NONPROFIT AGENCY ENDOWED FUNDS

Nonprofits from throughout the St. Croix Valley have partnered with the St. Croix Valley Foundation (SCVF) to establish nonprofit “agency” endowed funds. By providing a dependable annual source of revenue, **agency endowed funds** are an investment in a nonprofit’s future. An **agency endowed fund** not only guarantees a greater level of certainty in revenue and brings peace of mind to leadership, but an **agency endowed fund** also shows the community and donors that an organization is committed to its mission and here to stay.

We recognize that there are many investment professionals throughout the region with whom your nonprofit organization could partner.

There are important benefits of partnering with the St. Croix Valley Foundation on your **agency endowed fund** - we want you to be aware of each benefit.

Images represent hundreds of funds and grant programs of the St. Croix Valley Foundation: Special needs, elder programs, protected spaces, food shelves, faith communities, Valley environment, community libraries, theaters, arts, animal welfare



KEY BENEFITS OF PARTNERING WITH SCVF

- **Specialized Investment Expertise**

Agency endowed funds are part of the SCVF's diversified investment portfolio, providing the benefits and lower investment fees that typically come only with very large funds. The portfolio is monitored by a dedicated committee comprised of experienced financial and business professionals from throughout the St. Croix Valley and advised by Fund Evaluation Group, an independent asset management consulting firm specializing in nonprofit endowments

- **Permanence**

Establishing an endowed fund at the SCVF is an especially good fit for organizations wishing to permanently restrict funds that are currently unrestricted or quasi-endowed ("board designated"). When you establish an endowed fund benefiting your organization, you create a protected fund that will provide an annual stream of financial support for your work for generations to come.

- **Acceptance of Complex Gifts**

Gifts to the agency endowed fund will most often come directly from your organization. Your donors, when making more complex gifts, may want to make gifts directly to SCVF. Our team of charitable giving experts help donors with a variety of unusual gifts, including stock, real estate, life insurance, IRAs, and more. These gifts are often highly advantageous to donors but can be difficult for smaller nonprofits to process. In addition, through exclusive arrangement with Andersen Corporation, SCVF can facilitate gifts of appreciated Andersen Stock. For longtime or retired Andersen employees, this is a cost-effective way of making significant gifts to your organization.

- **Regional Visibility**

When you partner with SCVF, your endowment has the added visibility of being part of the Foundation's *family of funds*. We regularly connect with professional advisors and donors from throughout the Valley and will be delighted, when there's a fit, to talk about legacy gifts to your organization. (Cont.)

...AND MORE BENEFITS OF PARTNERING WITH SCVF

- **Administrative Support**

We provide clear concise reporting of all fund contributions, distributions earnings, and fees. Your organization's fund advisor(s) have real-time access to fund activity through our online Donor Advisor Portal. When requested, we can create sub-funds for gifts with restrictions; for example – a fund for a gift from a donor wanting to support a specific part of your work. SCVF staff and board members are available for periodic meetings with your board of directors or committees.

- **Fundraising Counsel and Support**

We serve as *expert resource* for your organization and donors. While we do not fundraise for you, we can provide resources to help you establish/market your planned giving program. We can also help your donors and their advisors integrate planned gifts into estate plans. If you'd like us to join you for a meeting with a prospective legacy donor, we are happy to do so!

- **Collaboration**

We're about more than transactions; we're about transformations. Net of our direct investment and administrative expenses, fees assessed on funds held at the SCVF support the work we do throughout the St. Croix Valley. When your nonprofit establishes an agency endowed fund with SCVF, you are also enabling community convenings, strategic grantmaking, nonprofit training, and the promotion of charitable giving that ultimately transforms the communities we call home.

Together we are stronger!



Heather Logelin

President and CEO

FOR THE VALLEY. FOR GOOD.

The St. Croix Valley Foundation is a 501(c)(3) nonprofit organization fully accredited by the Community Foundations National Standards Board and the Charities Review Council. Our mission is to enhance the quality of life in the St. Croix Valley; our ten affiliated community foundations encourage local philanthropy in response to local needs. Donations are tax deductible as allowed by law.

Amery Area Community Foundation
Chisago Lakes Area Community Foundation
Hudson Community Foundation
Lower St. Croix Valley Community Foundation
New Richmond Area Community Foundation

Northwest Alliance Community Foundation
Prescott Foundation
River Falls Community Foundation
Somerset Community Foundation
Stillwater Area Community Foundation



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