

## AGENCY FUNDS

Establishing an Agency Fund is a simple and efficient way to build future income for your nonprofit organization. Your donors can be sure they are providing a source of lasting support. Your fund becomes part of the St. Croix Valley Foundation's pool of endowed assets. Thus, the Foundation's economies of scale provide your organization the benefits of a diverse investment portfolio that typically come only with large funds.

Our experienced staff can help you develop planned giving programs to assist your donors with bequest giving, gifts of stock or other assets which will benefit your fund and add to the long-term growth of your organization. We handle all investment and administrative details.

How it works:

- ❖ Your board determines how much you would like to contribute to establish a long-term fund (\$10,000 minimum).
- ❖ You work with us to complete a simple fund agreement.
- ❖ We set up the fund in the name of your nonprofit organization.
- ❖ Your organization receives quarterly fund statements on the fund activity.
- ❖ Your organization and donors may add to the fund at any time.
- ❖ Each year, we notify you of the available distribution from the fund, and you let us know if you'd like us to issue a grant check to your organization, roll the available amount forward to next year, or return the available amount to the fund for re-investment.
- ❖ We handle all of the administrative details, including donor acknowledgements and investment oversight, giving you more time to concentrate on your mission.

Contact Heather Logelin to discuss your organization's situation and needs.  
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*This information is not contractual, is intended for informative purposes only, and is subject to change.*