

# NONPROFIT ENDOWMENT FUNDS

*Stability, Planned Growth, and Credibility for Nonprofits*



SACRAMENTO REGION  
COMMUNITY  
FOUNDATION

Through a Nonprofit Endowment Fund with the Foundation, community organizations can set aside funds to create long-term stability, plan for future growth or add to the organization's credibility with key donors.

The Foundation works closely with the leadership of your organization to help establish a fund that supports your goals for today and in the future. As an additional benefit, the Foundation handles the administration of the fund, leaving your staff and board free to focus on what matters – your mission on behalf of the community.

## GETTING STARTED IS EASY

A Nonprofit Endowment Fund can help to meet future needs by providing a relatively constant source of operating income. The fund can be opened for a minimum of \$10,000 and donors may use cash, stock, or other assets to grow the fund over time.

## KEY BENEFITS

Nonprofit Endowments are an ideal choice if you want to protect the longevity and legacy of your organization. Key benefits include:

### EASY

Our professional, experienced staff offers a proven track record in investment management for endowed funds and provides support to help you attract planned gifts to the fund.

### FLEXIBLE

Additional donations can be made to the fund anytime, and your designated Fund Advisors will have online access to information 7 days a week, 24 hours a day. The Foundation can accept gifts of many types of assets, including stock and – with Board approval – real property and closely held assets. We can also offer our expertise on growing the fund through donor cultivation for planned or current gifts.

### PERSONAL

A Nonprofit Endowment Fund is all about your organization and its goals for the future, whether that means long-range savings or funding for specific, mission-oriented projects and programs.

## EFFICIENT

We handle the administrative tasks of managing the endowment – from keeping track of your gifts and acknowledgement letters to managing the fund's investments, quarterly reporting and tax filings – all for a nominal annual support fee. The annual Support Fee is the greater of \$250 or 1% of the fund's balance for endowed funds.

## CONSIDER AN ORGANIZATION ENDOWMENT FUND IF YOU:

- Are a nonprofit organization with an IRS 501(c)(3) status with a solid annual operating budget and an appropriate operating reserve, as determined by your board of directors.
- Want to support the growth and stability of your organization into the future by creating a steady stream of operating funds at minimal cost. For example, an endowment of \$1 million will generate \$40,000 in operating funds annually, in perpetuity.
- Seek to attract additional gifts to your organization by demonstrating security and long-term vision.
- Aspire to build your Endowment Fund through planned gifts and estate planning strategies, including the option of offering Charitable Gift Annuities to your donors as a growth strategy.
- Want to achieve investment efficiencies by pooling your endowment with other funds at the Foundation to receive long term, sustained results with minimal volatility.
- Seek reliable investment expertise and oversight provided by our Board of Directors' Investment Committee.
- Prefer to focus on the mission of your organization rather than the tasks of managing an endowment.

## WE'RE HERE TO HELP YOU!

Learn more about the Foundation and Nonprofit Endowment Funds by visiting us online at [www.sacregcf.org](http://www.sacregcf.org) or in person at 955 University Avenue, Suite A in Sacramento, or by calling us at 916.921.7723.

# NONPROFIT ENDOWMENT FUNDS

EFFECTIVE 12/31/15

## NONPROFIT ENDOWMENT FUNDS

916Ink Endowment Fund  
American Marketing Association Sacramento Valley  
Education Foundation  
American River Natural History Association (ARNHA)  
Endowment  
Assistance League of Sacramento Endowment Fund  
B Street Theatre Endowment Fund  
Boys & Girls Clubs of Greater Sacramento Endowment Fund  
Casa Garden Endowment  
Celebration Arts Endowment  
Children's Receiving Home of Sacramento  
Dixon Little League Fund  
Easter Seals Superior California-Joanne Budge  
Endowment Fund  
The Effort Endowment  
Ethan Allen Herr Memorial Endowment Fund  
Eureka Schools Foundation Endowment  
Fairytale Town Endowment Fund  
\* FUTURE Foundation of Sacramento  
HomeAid Sacramento Endowment Fund  
Institute for Local Government Legacy Fund  
Jack & Lillian Sioukas Endowment Fund to Benefit the  
Sacramento Public Library Sacramento Room  
Junior League of Sacramento Endowment Fund  
Lazarus Project, Inc. Welcome Home Fund  
Lloyd Steinkamp Endowment Fund for Far Western District  
Harmony Camps  
National Coalition of 100 Black Women, Sacramento Chapter  
NCHS-Firehouse No. 1 Museum Endowment  
NCHS-North Star Mining Museum Endowment  
NCHS-Railroad Museum Endowment  
NCHS-Searls Historical Library Endowment  
Nevada County Historical Society (NCHS)  
PRIDE Industries Endowment  
Rebuilding Together Sacramento Endowment Fund  
River City Food Bank Endowment  
Roseville Community Crimestoppers Foundation, Inc. Fund  
Sacramento Choral Society & Orchestra Endowment  
Sacramento Gay Men's Chorus Endowment  
\* Sacramento Gay Men's Chorus Expendable Fund  
Sacramento LGBT Community Center Endowment  
Sacramento Master Singers John Crowell Memorial Endowment  
Sacramento Tree Foundation Endowment  
Sierra Service Project Endowment  
Solar Cookers International Endowment Fund  
Soroptimist International of Greater Sacramento  
Endowment Fund  
Swainson's Hawk Endowment Fund  
Triple "R" Endowment  
VERGE-CCAS Burnett & Mimi Miller Endowment  
WEAVE Fund for Ending Domestic Violence

## AFFILIATE: LODI COMMUNITY FOUNDATION

All Veterans Plaza Fund  
Animal Friends Connection Humane Society Endowment Fund  
\* Animal Friends Connection Humane Society Expendable Fund  
Children's Endowment, Share Homes Adoption Agency  
Hospice of San Joaquin Endowment Fund for the Benefit of  
Lodi Area Residents  
Hutchins Street Square Foundation Endowment Fund  
Lodi Boys & Girls Club Endowment  
Lodi Boys & Girls Club Bo Katakian Charitable Foundation  
Lodi Community Concert Association Endowment Fund  
Lodi Community Foundation Endowment Fund  
Lodi House Endowment Fund  
\* Lodi House Expendable Fund  
Lodi Library Foundation Endowment Fund  
\* Lodi Library Foundation Improvement Fund  
Lodi Lions Club Foundation Charitable Fund  
Lodi Parks and Recreation Endowment Fund  
\* Lodi Parks and Recreation Fund  
LOEL Foundation Endowment Fund  
Pregnancy Resource Center of Lodi Endowment  
Salvation Army Culinary Program Endowment  
Women's Center of SJC-Phoebe Watt Endowment  
World of Wonders Science Museum Endowment Fund

## AFFILIATE: YOLO COMMUNITY FOUNDATION

\* Cache Creek Conservancy Reserve Fund  
Cache Creek Nature Preserve Endowment Fund  
\* Davis Arts Center Long-Term Investment Fund  
\* Davis Recreation & Community Services (RCS) Program Fund  
Davis Senior Services Endowment Fund  
\* Davis Senior Services Improvement Fund  
\* Friends of the Davis Library Fund  
\* Friends of the Yolo Community Foundation  
Joan Q. Hogan Endowment  
Putah Creek Council Endowment Fund  
\* Putah Creek Council Expendable Fund  
Valley Elderberry Beetle Mitigation Fund  
Western Yolo Recreation Aquatic Fund  
\* Woodland Shakespeare Club  
Yolo Children and Families Fund  
\* Yolo County CASA  
\* Yolo County Children's Alliance Charitable Fund  
\* Yolo County Historical Society Fund

\* *Expendable Funds*