

# NONPROFIT ENDOWMENT FUNDS

*Stability, Planned Growth, and Credibility for Nonprofits*



Through a Nonprofit Endowment Fund with the Foundation, community organizations can set aside funds to create long-term stability, plan for future growth, and 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 current and future goals. 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:

### EASE

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.

### FLEXIBILITY

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.

### PERSONALIZED SERVICE

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

## EFFICIENCY

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), in person at 955 University Avenue, Suite A in Sacramento, or by calling us at (916) 921-7723.

## NONPROFIT ENDOWMENT FUNDS

916Ink Endowment Fund  
 \* ALF-MVC Leadership 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  
 Capital Stage Endowment Fund  
 Casa Garden Endowment  
 Celebration Arts Endowment  
 Children's Receiving Home of Sacramento  
 Cordova Community Council Foundation Endowment  
 Dixon Little League Fund  
 Easter Seals Superior California-Joanne Budge Endowment Fund  
 Ethan Allen Herr Memorial Endowment Fund  
 Eureka Schools Foundation Endowment  
 Fairytale Town Endowment Fund  
 \* FUTURE Foundation of Sacramento  
 HomeAid Sacramento Endowment Fund  
 Hope Cooperative 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 Building Fund  
 NCHS-Railroad Museum Endowment  
 NCHS-Searls Historical Library Endowment  
 Nevada County Historical Society (NCHS)  
 PRIDE Industries Endowment  
 \* PRIDE Industries Power of Purpose Fund  
 \* Rev. Paul Scheider Memorial Library Capital Campaign Fund  
 Reason Center  
 Rebuilding Together Sacramento Endowment Fund  
 River City Food Bank Endowment  
 Roseville Community Crimestoppers Foundation, Inc. Fund  
 Runnin for Rhett  
 Sacramento Ballet Endowment  
 Sacramento Choral Society & Orchestra Endowment  
 Sacramento Covered Endowment for Patient Care  
 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 SPCA Endowment Fund  
 Sacramento Tree Foundation Endowment  
 Saranaloka Foundation Endowment Fund  
 Sierra Service Project Endowment

Solar Cookers International Endowment Fund  
 Soroptimist International of Greater Sacramento Endowment Fund  
 STARS Endowment Fund  
 Swainson's Hawk Endowment Fund  
 Triple "R" Endowment  
 VERGE-CCAS Burnett & Mimi Miller Endowment  
 WEAVE Fund for Ending Domestic Violence  
 WellSpace Health Endowment Fund

### PARTNER: 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 Adopt-A-Child  
 \* Lodi Aquatic Center  
 Lodi Boys & Girls Club Endowment  
 Lodi Boys & Girls Club Bo Katzakian 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 Lions Club Foundation Charitable Fund  
 \* Lodi Memorial Hospital Foundation-Healthy Lodi 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

### PARTNER: 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 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 County CASA  
 \* Yolo County Children's Alliance Charitable Fund  
 \* Yolo County Historical Society Fund  
 \* Yolo County Library Foundation Expendable Fund  
 Yolo Food Bank Endowment for Poverty Reduction & Food Security

\* *Expendable Funds*