

Through a Nonprofit/Community-Based Organization (CBO) 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.

GETTING STARTED IS EASY

A Nonprofit/CBO 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 include:

PERSONALIZED SERVICE

A Nonprofit/CBO 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. An endowment fund is an ideal choice if you want to protect the longevity and legacy of your organization with a fund that is invested in perpetuity and a portion of the balance can be granted out each year. An expendable fund is another option that allows you to decide when and how much to give as long as you maintain a minimum balance of \$500.

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 endowed or expendable 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.

EFFICIENCY

We handle the administrative tasks of managing the fund – 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 and expendable funds.

SPECIALLY DESIGNED BENEFITS

- Planned Giving Forum of Sacramento membership for two staff or board members, including planned giving training
- Priority selection in year-round capacity building training for nonprofit/CBOs
- Continued education on fundraising with one-on-one guidance from Foundation staff on how to build your fund
- Inclusion in the Foundation's online donation portal, and access to additional tools to make growing your fund easy
- Networking opportunities at fundholder events
- Priority invitations, as appropriate, to be highlighted at Foundation activities, like Big Day of Giving and Philanthropic Advisors' Forum events
- Organization highlights in the Foundation's Impact magazine, website, social media posts, and e-newsletters

CONSIDER A NONPROFIT/CBO FUND IF YOU:

- Lead a nonprofit organization with an IRS 501(c)(3) status with a solid annual operating budget and an appropriate operating reserve.
- 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, and aspire to build your fund through planned gifts and estate planning strategies, including 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.
- Prefer to focus on the mission of your organization rather than the tasks of managing an endowment.

WE'RE HERE TO HELP!

Learn more about the Foundation and Nonprofit Endowment Funds by visiting us online at www.sacregcf.org 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
 * CAFF California Family Farmer Emergency Fund
 Capital Stage Endowment Fund
 Celebration Arts Endowment
 Children's Receiving Home of Sacramento
 Cordova Community Council Foundation Endowment
 David Williamson Rugby Referee Scholarship 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
 Lloyd Steinkamp Endowment Fund for Far Western District Harmony Camps
 NCHS-Firehouse No. 1 Museum Endowment
 NCHS-North Star Mining Museum Endowment
 * NCHS-North Star Mining Museum Expendable Fund
 * NCHS-Railroad Museum Building Fund
 NCHS-Railroad Museum Endowment
 NCHS-Searls Historical Library Endowment
 Nevada County Historical Society (NCHS)
 Placer Land Trust Natural Wonders Forever Endowment Fund
 PRIDE Industries Endowment
 * PRIDE Industries Power of Purpose Fund
 * Rev. Paul Scheider Memorial Library Capital Campaign Fund
 Reason Center Endowment
 Rebuilding Together Sacramento Endowment Fund
 River City Food Bank Endowment
 Roseville Community Crimestoppers Foundation, Inc. Fund
 Runnin' for Rhett Legacy Fund
 * Runnin' for Rhett Short Term Savings
 Sacramento Ballet Endowment
 Sacramento Choral Society & Orchestra Endowment
 Sacramento Covered Endowment for Patient Care
 Sacramento Gay Men's Chorus Endowment
 Sacramento LGBT Community Center Endowment
 Sacramento Master Singers John Crowell Memorial Endowment
 Sacramento SPCA Endowment Fund
 Sacramento Tree Foundation Endowment
 San Juan Education Foundation Endowment Fund
 Saranaloka Foundation Endowment Fund
 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
 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
 Directions Medical Clinic Endowment
 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
 Salvation Army Culinary Program Endowment
 United Way of San Joaquin Endowment Fund
 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
 Center for Land-Based Learning 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
 Friends of Yolo County Archives
 Joan Q. Hogan Endowment
 * People Resources, Inc. dba Meals on wheels of Yolo County Fund
 Putah Creek Council Endowment Fund
 * Putah Creek Council Expendable Fund
 Valley Elderberry Beetle Mitigation Fund
 Western Yolo Recreation Aquatic Fund
 * Winters Senior Center Fund
 Woodland Schools Foundation Endowment 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