



AGENCY FUND

Nonprofit fund management.



Fund Growth and Sustainability

With over 600 funds under management, the Community Foundation of NCW understands charitable investments. Opening an agency fund has many benefits for your organization:

- Professional investment management and oversight
- Ability to accept all types of gifts, including complex assets
- Gifts to your fund can be made by anyone at any time
- Low administrative and management fees
- Local stewardship
- Online access to your fund, anytime

How it works

An **Agency Advised Fund** is non-endowed fund, allowing the principal and earnings to be available to the nonprofit at any time; distributions are restricted to benefit only your nonprofit.

An **Agency Endowed Fund** is important for your organization's long-term sustainability. The principal of the fund is held in perpetuity while an annual distribution (roughly 5% of the fund balance) is made based on a spending policy that complies with state law. As the endowment fund grows, so does your annual distribution.

Getting Started

With a minimum \$5,000 contribution and a simple fund agreement, you can get started right away. Call us at (509) 663-7716 or email info@cfncw.org to make an appointment.

The Foundation partners with over 70 nonprofits across the region, providing security, growth, and expanded giving opportunities while relieving the burden of complex account management.

"Having our funds at the Community Foundation has allowed them to grow at a greater rate of return than investing on our own and we always know exactly how they are performing. Not having to spend hours managing our funds also allows us to have more time to focus on our mission of raising more funding to support Wenatchee Valley College students and programs. It has been a wonderful partnership for us!"

—Wenatchee Valley College
Foundation, Agency Fundholder

