

Long-term, sustainable income for your charitable

Agency Fund

Setting up an Agency Fund with the Community Foundation of Greater Peterborough can help your organization's long-term financial sustainability.

An Agency Fund at the Community Foundation can be an important part of your organization's long term financial plans.

An Agency Fund is an attractive option for charities that currently manage endowed or long-term funds, have received large bequests, or are interested in diversifying their investments. Funds are gifted from your organization to the Community Foundation and invested to provide long term, regular support for your organization. Your agency receives an annual grant from the fund – revenue that will help support your charitable activities for years to come.

Your donors can support your work, secure in the knowledge that their contributions will provide earnings that will help sustain your organization's mission.

The Community Foundation has the mission, charitable tax structure and specialized expertise to support registered charities in building and sustaining agency funds. By choosing to join other charities in entrusting your assets to the Community Foundation, you are also enhancing the Foundation's ability to support the broader charitable sector, inspire giving, and build a vital community for everyone.

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705.740.2347 www.cfgp.ca info@cfgp.ca
Registered charity: 876232315



Benefits of an Agency Fund

- An annual grant from the Fund each spring
- Annual statements detailing all of the activity on your fund
- Donations to your fund can be accepted directly by the Community Foundation and we will issue charitable donation receipts directly to donors for those gifts
- Administration of estate gifts to your Fund
- Promotion of your Agency Fund on our website and through customized online giving pages
- Inclusion of your Fund in our publications including Annual Report, newsletters and other materials
- Recognition at annual Community Celebration event

Join other local charities that have placed their trust in the Community Foundation

- 4th Line Theatre
- GreenUP
- Hospice Peterborough
- Kawartha Land Trust
- New Canadians Centre (Welcome Fund)
- Otonabee Conservation Authority
- Peterborough Field
- Naturalists
- Peterborough Historical Society
- Telecare Peterborough
- YWCA Peterborough Haliburton (What's Next Fund)

What it costs

An Agency Fund is cost-effective. Your share of the investment, legal, audit, administration and reporting expenses of the pooled fund may be less than with a separately managed investment program.

The Community Foundation recovers administration costs through a 2% Philanthropic Advisory Service Fee (PASF). This fee helps us help the charitable sector in our community. A further 0.5% is charged by the investment manager.

How it works

- With as little as \$10,000 you can establish an Agency Fund for your charitable organization.
- Your board determines how much to dedicate to a long-term fund at the Community Foundation.
- Your organization works with our staff to complete a fund agreement.
- We set up a fund in the name of your organization.
- You, or your donors, can add to the fund at any time. This can be useful for planned giving or legacy gifts.
- The Foundation can accept a range of donations including gifts of appreciated securities, real property, life insurance and USD gifts.
- We handle all the administrative details
- A customized page will be set up on the Foundation's website to accept on-line donations to your fund.
- Your organization receives annual statements on the fund.
- Each year, earnings from your fund are used to make a grant to your organization, at minimum, 5% of the fund's value.



Investment Approach

Pooling your funds with those of other charitable organizations provides access to the diversified investment portfolio and low investment fees that typically come only with larger portfolios.

The Foundation's primary investing goals are to generate returns sufficient to provide current and future funding for granting and services; to ensure financial stability; and to ensure that 100% of the investment portfolio is invested in alignment with the Foundation's purpose and values. Our pooled funds are currently invested in a fossil fuel free portfolio.

Your board is freed from investment management responsibility and your donors may be assured that their gifts will grow - providing a legacy of dependable, long-term support.

**Community
Foundation**
of Greater Peterborough

