



FUNDS AND SERVICES FOR NONPROFITS

The Community Foundation of Tampa Bay is committed to strengthening and serving the nonprofit community. As part of that commitment we manage assets and reserves for nonprofit organizations. We also assist with planned giving and other complex gift options.

WE OFFER 2 TYPES OF FUNDS

- 1 Agency Reserve Fund:** Your organization authorizes the Community Foundation to manage the money within its selected portfolio. The organization can request and receive up to 100% of its assets as requested. This option is best for organizations that want an endowment but also require flexibility.
- 2 Agency Endowment Fund:** Your organization establishes an endowment fund with the Community Foundation in perpetuity. An annual payout based on the Community Foundation's spending policy is designated to your nonprofit. This option is best for organizations that want to assure donors that the endowment's principal will remain intact or honor a donor's bequest to the endowment fund.

THE COMMUNITY FOUNDATION
OF TAMPA BAY OFFERS
ENDOWMENT-BUILDING
SOLUTIONS FOR NONPROFITS.
WE HELP LOCAL NONPROFITS
BUILD THEIR RESERVE FUNDS
AND ENDOWMENTS SO THAT
QUALITY PROGRAMS AND
SERVICES CAN CONTINUE FOR
YEARS TO COME.

AGENCY FUNDS

BENEFITS OF AN AGENCY FUND

- **Low cost:** The size of our investment portfolio drives investment costs down.
- **Oversight:** We have a fiduciary duty to ensure prudent investment of your assets. Investment activity is overseen by an investment committee and our experienced staff.
- **Diversification:** Our investment portfolios are diversified across a broad range of classes and strategies.
- **Alignment of interests:** Our own assets are invested with the same managers in the same pools.

SERVICES FOR AGENCY FUNDS

- **Planned giving options:** We can help donors benefit your organization by expanding your charitable giving options. For example, with a charitable gift annuity, your donors receive maximum tax benefits and a lifetime income stream.
- **Non-cash gifts:** The Community Foundation can assist your organization and your donors by facilitating these types of gifts.
- **Recognition:** Your nonprofit fund will be listed on our website as a nonprofit partner.
- **Donor connections:** By joining the Community Foundation, your organization is recognized as a nonprofit partner, which provides our network of donors with access to your fund.



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TO COME. ”

– Paul Grove

President and CEO, WEDU PBS



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