

Organization Endowment

Sustaining your mission.



Benefits include:

By establishing an Organization Endowment Fund at the Community Foundation for Mason County, you're sending a signal to your constituents and the community that you're here to stay.

It provides a great platform on which to engage your donors in a conversation about the future and strengthen your relationships with them.

- We handle the investment management and administrative responsibilities, allowing you to concentrate on building your fund and fulfilling your mission.
- An endowment provides a unique and powerful giving vehicle for your donors. Endowments last forever and aim to provide a stable increasing stream of income.
- Endowments are especially well-suited to planned gifts, which are generally the largest gifts. Donors may be comfortable leaving them to a Community Foundation endowment fund rather than direct to a charitable organization.
- Endowment funds are most successful and yield the most investment potential the larger they are. By pooling your funds with the Community Foundation you will enjoy the benefits of a diverse investment portfolio and low investment fees.
- All gifts are tax-deductible to the maximum extent of the law. We provide assistance for your donors with making gifts of cash, stocks, bonds, real estate, Qualified Charitable Distributions from IRAs, or other assets, including planned gifts. Donors may also choose to give anonymously.
- By partnering with a local philanthropic leader you increase visibility of the Fund and the potential for additional contributions.
- It's a simple, efficient way to build an endowment in support of your organization!

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Here's how it works:

- A minimum amount of \$10,000 is needed to establish a permanent endowment Fund.
- You work with the Community Foundation to develop a fund agreement that meets your objectives.
- Gifts are tax-deductible and contributions can be made online at www.mason-foundation.org or by check made payable to the Community Foundation for Mason County with the Fund name included on the memo line. In addition, gifts of stocks, bonds, real estate, Qualified Charitable Distributions from IRAs, or other assets, including planned gifts may be accepted.
- The Foundation handles the administrative and investment management of the Fund, including sending gift receipts to donors. We provide the Organization with quarterly fund statements including gifts received, donor names, investment activity, and grants or disbursements from the fund. We also provide access to fund activity in an online portal for fundholders.
- Endowments are assessed annual fees for administrative and investment management services, which are assessed quarterly. The Foundation's fee schedule is reviewed annually and subject to change.
- Generally, the annual amount available to support the purpose of the Fund is provided in accordance with the Community Foundation's Spending Policy, which may change from time to time.
- The amount available to spend may be requested at any time. Simply provide a copy of meeting minutes from the advisory body to the Fund that include the approval and amount of the request.
- The administrative burden of managing an endowment is handled by the Community Foundation and we make it easy for you to access fund information.