



NONPROFIT FUNDHOLDER

Guide

GROWING FOR GOOD

Let the Community Foundation grow your resources, as you
grow your organization.



SAFEGUARD YOUR *Organization's* FINANCIAL FUTURE

The Community Foundation for Palm Beach and Martin Counties is committed to helping our nonprofit partners grow their capacity beyond annual grantmaking. We are a sustainable investment partner capable of managing your organization's long-term assets and securing its financial future.

We are here to help your organization establish stable, predictable sources of income that look after its long-term needs. Nonprofit funds through the Community Foundation can serve as part of your funding mix, stabilize your revenue, and give your organization visibility among our vast network of donors.

ADVANTAGES OF PARTNERING WITH THE COMMUNITY FOUNDATION

- Your organization's assets will be invested alongside our own, opening the door to **high-performing investment vehicles** you may not otherwise access
- While commingled for investment, your organization's fund will not be used for other purposes; **all gifts will be restricted** for your benefit
- Exposure to our sophisticated investment resources can provide your organization with greater **growth, lower investment fees**, a reliable **income source**, and **sustainability** for now, and forever
- All gifts are tax deductible at the **highest levels allowed**
- We handle your **investment management and oversight** alongside our Chief Financial Officer and Outsourced Chief Investment Officer (OCIO), including all accounting, financial reporting, gift acknowledgments, and other administrative tasks

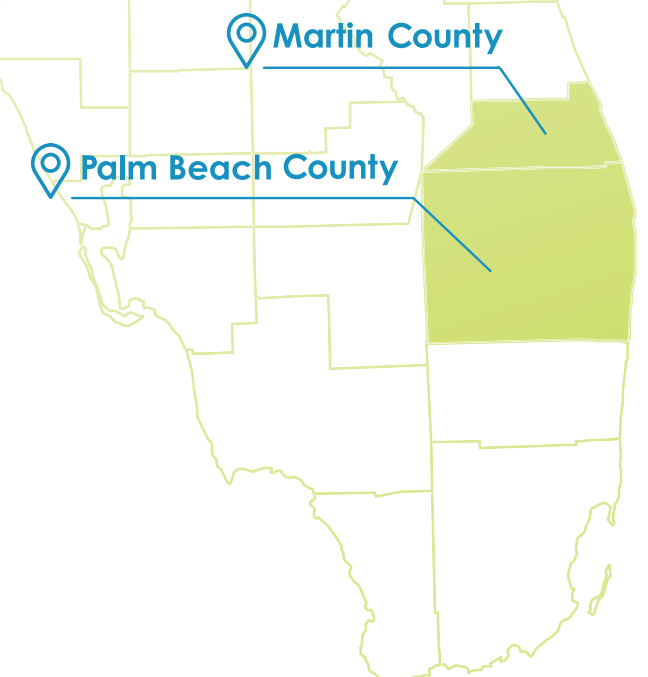
Invest with Us

Network of
9,000+
donors

\$240M+
investment pool

80+
Nonprofit Funds

100/100
rating for finance
and accountability
by Charity Navigator



Types OF FUNDS

NONPROFIT ENDOWMENT FUND:

For nonprofits that want to protect long-term assets while receiving annual distributions to support their mission. The fund is invested in our endowment portfolio to provide long-term sustainability. This option is ideal for those who want to assure their donors that the endowment's principal will remain intact or honor a donor's bequest to the endowment fund.

NONPROFIT NON-ENDOWED FUND:

For nonprofits that want to protect medium-to-long-term assets. You may request distributions back to your organization as needed for maximum flexibility. The fund is invested in one of our non-endowed portfolios to generate long-term growth. You may request and receive up to 100% of your portfolio assets at any time.

SERVICES FOR *Nonprofit* FUNDS

PLANNED GIVING OPTIONS: The Community Foundation can help donors benefit your organization by expanding their 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 donors by facilitating diverse types of gifts.

RECOGNITION: Your nonprofit fund is listed in partnership on our website.

ONLINE ACCESS: Get fund information at any time through our easy and secure online portal.

CAPACITY-BUILDING RESOURCES: We offer nonprofit educational events, including endowment building and board training.

COMMUNITY FOUNDATION FUND *vs.* COMMERCIAL FUNDS

While community foundations and commercial funds share some of the same benefits, funds at the Community Foundation provide opportunities to strengthen our area.

The fees on a Community Foundation fund are reinvested into the community

through programmatic work, staff support and grantmaking, a key differentiator from commercial funds where fees benefit stakeholders — not your community.

The Community Foundation handles everything, including all the back-office and administrative tasks, freeing up your team to focus on serving the community.

WHAT OUR *Say* NONPROFIT FUNDHOLDERS ABOUT US

"We entrusted a seed fund with the Community Foundation that we hope to grow exponentially to fund the college dreams of thousands more local students. We know that the Community Foundation has a large portfolio of philanthropic donors that we hope to get in front of, so we see our partnership as a win-win."

— Jervonte Edmonds, Executive Director,
Suits for Seniors



"We're here to supplement what the Palm Beach County School District can't provide. We pull students from all demographics across the county. Our goal is to continue to provide world-class art and academic curricula, along with the necessary tools, so they may attain the highest level of educational achievement. That's why we're so grateful to all of our donors, the Community Foundation, and our Dreyfoos School of the Arts Foundation Fund: you helped us maintain equal footing throughout COVID."

— Dr. Chris Snyder, Executive Director,
Dreyfoos School of the Arts Foundation





GIVING FOR GOOD



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