COMMUNITY FOUNDATION
giving today. growing tomorrow.
of South Alabama

AGENCY ENDOWMENT FUNDS

Your organization's mission and programs are essential to the community and the individuals it serves. By creating an endowment fund with The Community Foundation of South Alabama, you can invest in your organization's future.

HOW IT WORKS:

- An endowment fund can be established with a gift of $100,000 to the Foundation.
- The fund is invested and can grow over time to generate an increasing stream of funding devoted to your organization's mission.
- We accept a wide range of gift types such as real estate, tangible personal property and life insurance.
- Any donor to the fund receives a tax deduction and an acknowledgement letter from the Foundation at the time of the gift.
- We can assist with estate planning to help your donors leave a gift to the fund.

PRUDENT INVESTMENT MANAGEMENT

Charitable funds are pooled together with our assets and invested. Our goal is to make your charitable giving easy. We handle all the fund maintenance, investment management, distributions, tax reporting and records. You will receive a quarterly fund report and can access fund activity and submit grants online.

QUESTIONS?

Call 251.438.5591 or visit www.communityfoundationsa.org.

HERE'S AN EXAMPLE OF HOW AN AGENCY FUND COULD WORK:

The Alabama Society Sons of the American Revolution are lineal descendants of those patriots that achieved the independence of the American people. They established a permanent endowment fund with the goal of growing the fund and improving the distributions of the endowment back to the state society. Their goal is to perpetuate a more profound reverence for the princi-ples of the government founded by our forefathers. By growing the ALSSAR Fund, the group can provide larger annual distributions to the state society and the community as needed through its programs.

An annual administrative fee for management of a charitable fund is calculated quarterly based on the market value of the fund balance at the end of each quarter. Fees are subject to change without notice.