



ENDOWMENT FUNDS

BUILDING SECURITY FOR THE FUTURE

PHILANTHROPY PORTFOLIO

Organization Endowment Funds provide an exemplary service tailored to the needs and capacity of your nonprofit organization.

YOUR ORGANIZATION'S ENDOWMENT FUND

represents your future and the resources to support, enhance, and expand the services you provide to impact and improve our community. Our goal is to help your organization build its Endowment Fund. The following are The Columbus Foundation's services exclusive to organizations that have established Endowment Funds here.

WHAT SERVICES TO EXPECT

- A personal Donor Services advisor with expertise in planned and current giving and endowment benefits strategies
- Online access to review gifts, distributions, and status of your Endowment Fund
- Semi-annual distribution or reinvestment of income from your Endowment Fund (February and August)

KNOWLEDGE TOOLBOX

- Consultation with your donors, their professional advisors, and your staff to discuss planned and current gifting vehicles
- Presentations to your donors, board, or staff on a variety of endowment-related topics
- Charitable Gift Annuity program available to your organization's donors
- Assistance with the writing of technical pieces for your organization's newsletter, brochures, and other informational materials
- Technical competence in negotiating and completing gifts of assets such as cash, appreciated securities, closely-held stock, real estate, life insurance, IRAs and retirement plans, charitable lead and remainder trusts, and bequests

OUR DUE DILIGENCE

- Process all direct gifts to your Endowment Fund
- Acknowledge all direct gifts to the donor regardless of the size of the gift

KEY BENEFITS

ENDOWMENT FUNDS



- Notify your organization of all gifts to your Endowment Fund
- Issue Quarterly Fund Journals detailing investment status and asset allocation
- Provide an annual review of fund investment performance
- Distribute assets to your organization or another public charity pursuant to terms of the Letter of Transmittal
- Provide a credible and *trusted philanthropic advisor*® role to you and the community

ABOUT THE COLUMBUS FOUNDATION

The Columbus Foundation serves thousands of individuals, families, and businesses that have created unique funds and planned gifts to make a difference in the lives of others through the most effective philanthropy possible. The Columbus Foundation is **Your Trusted Philanthropic Advisor**® and is among the top 10 largest community foundations in the United States.

WE'RE HERE TO HELP!

Learn more about The Columbus Foundation and Administrative Fees by visiting us online at columbusfoundation.org. Please contact one of our Donor Services advisors by calling 614/251-4000 or emailing dsd@columbusfoundation.org.

