



Lake County's Community Foundation

Your Community Foundation

Agency Funds

A simple and efficient way to build a permanent source of income for your nonprofit.

Donors can be sure they are providing a source of lasting support when they contribute to your Agency Fund.

Your fund becomes part of the Legacy Foundation's pool of endowed assets. This provides your organization the benefits of a diverse investment portfolio that typically comes only with large funds.

Legacy Foundation offers organizations training and resources to assist donors with bequest giving, gifts of stock or other assets that will benefit your Agency Fund and add to the long-term growth of your organization.

How it Works

- Your Board determines the amount of the initial gift to establish your Agency Fund.¹
- You make a gift to Legacy Foundation. Legacy Foundation accepts gifts of cash, appreciated stocks, real estate or other assets.
- We set up an Agency Fund in the name of your nonprofit organization.
- Your gift is endowed and invested over time. The earnings from your fund provide a source of annual income to your organization.²
- Your organization and your donors may add to the fund anytime. We offer your donors the ability to make online gifts directly to your Agency Fund.
- You receive semi-annual statements detailing the fund activity.
- Legacy Foundation handles all of the administrative details of your Agency Fund – including investment management and donor acknowledgments, giving you more time to focus on your mission.

1. Minimum amount to establish an Agency Fund is \$10,000. The Fund may be established with \$5,000 with the goal of reaching \$10,000 within three years.
2. The amount available to spend is based on Legacy Foundation's Spending Policy.



Meals on Wheels of Northwest Indiana Endowment Fund

We are tremendously grateful for the opportunity to have an agency endowment fund at The Legacy Foundation. It is comforting to know that the funds we receive from our endowment are unrestricted and can be used for our greatest need. Our endowment fund will provide years and years of steady income our organization can depend on to support the nutritional needs of those we serve.

Sandra Noe

Executive Director, Meals on Wheels of Northwest Indiana

DISCOVER HOW WE CAN HELP YOU TODAY, MAKE A DIFFERENCE FOREVER.

Discuss your giving options:
Carolyn Saxton, President
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219.736.1880



Confirmed in compliance with National Standards for Community Foundations