

Endowing your charitable organization



AGENCY ENDOWMENT FUNDS

Establishing an Agency Endowment Fund at Hamilton Community Foundation is a simple and efficient way to build an income for your charitable organization. HCF's experienced staff can assist in a number of ways including with investment management and administrative details.

How it works

- Your board determines how much you would like to invest long term.
- Your organization works with Hamilton Community Foundation's professional staff to complete a fund agreement.
- We set up a special fund in the name of your charitable organization.
- Your organization receives regular statements on the fund.
- You can add to the fund at any time.
- We handle all the administrative details – including investment management – so that your organization can focus on its mission.
- Your gift is placed into an endowment that is invested over time. Earnings from your fund are distributed back to your organization, helping you to do your good work in this community.

Building a Legacy

In 2002, noting HCF as “our local specialist in building and holding endowment funds,” The Art Gallery of Hamilton entrusted the management of its *Building a Legacy Fund* to the Foundation.

As the fund grows, it helps to ensure the Gallery's future financial health. Ongoing operating funds – the resources that sustain all non-profits – are often the most difficult to raise and an endowment fund is an important step toward financial sustainability. HCF holds agency endowments for many local organizations, from the AGH to the YWCA.

Louise Dompierre, Gallery President and CEO, says that “over the years, Hamilton Community Foundation has built a very strong reputation and a high level of credibility. We have confidence in their management of the Gallery's fund. It's a very beneficial partnership for us and for our supporters – the Gallery doesn't have to manage the fund, which after all is not our core business, and donors can be assisted by Hamilton Community Foundation to make contributions that work well for them. It really is a win-win arrangement.”



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For Hamilton, For Ever

To read more stories of donors who chose Hamilton Community Foundation, visit www.hcf.on.ca



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Hamilton Community Foundation

Our mission is to strengthen Hamilton's quality of life as an inclusive and sustainable community by acting as a catalyst and by connecting people, ideas and resources through community philanthropy.

We do this by:

- **Building resources for long-lasting solutions.** We work with donors to build funds that ensure vital futures for our community.
- **Supporting all aspects of community life.** We grant to the widest possible range of organizations and initiatives.
- **Fostering community leadership.** We bring people together from all parts of the community to stimulate new ideas, build participation and strengthen community philanthropy.

Knowledge – of philanthropy and the community – is what sets us apart.

- **We know Hamilton's long-term issues and opportunities and align donors' philanthropic interests.**
- **We create innovative solutions and partnerships to advance community goals and maximize donors' impact.**
- **We provide expert, professional reliable, flexible services.**

Contact us:

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Agency Endowment Funds

More benefits

An agency endowment fund is a safe and simple way for your non-profit organization to establish its own endowment. Your donors can be sure that the endowed fund's principal will not be spent and can grow over time, providing a source of lasting support. And HCF's economies of scale provide your organization with the benefits of a diverse investment portfolio and low investment fees that typically come only with very large funds.

Your organization's regular donors can leave a bequest through Hamilton Community Foundation to create a personal legacy and benefit your organization forever. HCF can facilitate even the most complex planned gifts or gifts of appreciated stock or real estate. We handle investment management and the administrative responsibilities related to the funds so that your organization's staff and volunteer hours are concentrated on fulfilling your mission.

Hamilton Community Foundation was founded in 1954. Since then, HCF has made grants to our community totaling more than \$55 million. Last year, HCF granted approximately \$4.1 million to Hamilton organizations involved in health, social services, arts, environment, education and recreation.

We are part of Canada's community foundation movement, represented by more than 160 community foundations from coast to coast. Together, we help Canadians invest in building strong and resilient places to live, work and play.