

# Designated Agency Endowment Funds



## Four Steps to a Designated Agency Endowment Fund



**1.** Your board approves the creation of, and the amount used to establish, the fund (\$10,000 minimum).



**2.** WYCF works with you to complete a fund agreement.



**3.** The fund is set up in your nonprofit's name, giving you guaranteed income forever.

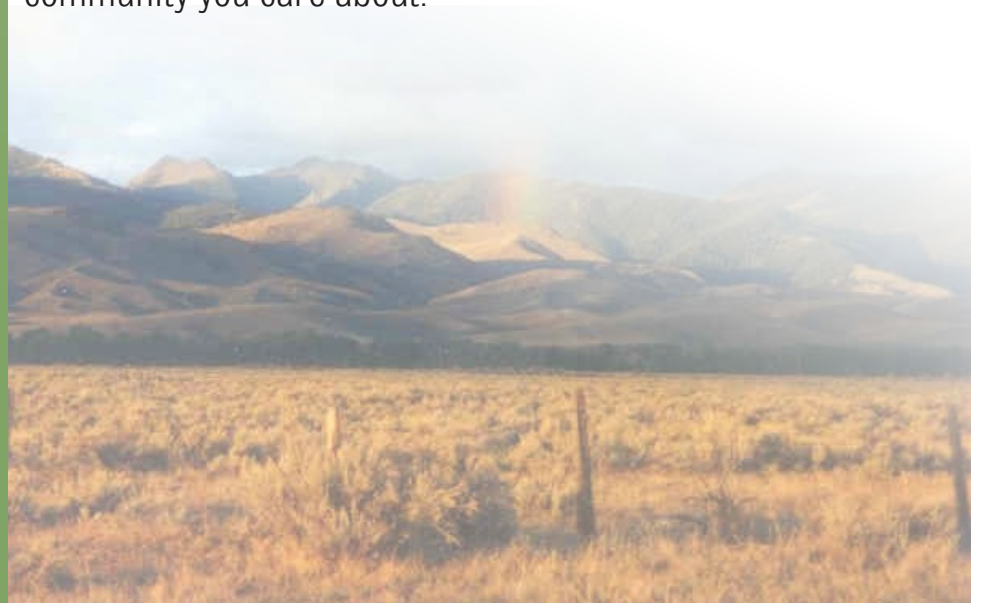


**4.** Funds and donations are permanently invested to support you in the long term.

Your organization is looking for an expert partner who can ensure your long-term financial security. You want the security to keep serving your community for years to come.



The Wyoming Community Foundation understands the nonprofit community and its needs. We work to ensure that nonprofits grow and thrive, in good times and in bad. A Designated Agency Endowment Fund provides you with a unique combination of expert organizational support and long-term financial security. When your endowment is at the Wyoming Community Foundation, we become your partner by investing in your organization and in the community you care about.

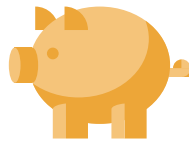




## Security

**in a lasting legacy for you and your donors.**

Since 1989, WYCF has worked to build a better Wyoming by investing in the nonprofit community. WYCF has over \$200 million in assets which are managed by our investment committee and Mason Investments, experts in nonprofit fund management.

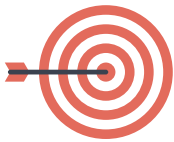


## Sustainability

**of your fund's principal, which will never be**

**touched, letting it grow for the future.**

WYCF leaves your fund's principal intact, protecting the permanency of your endowment. The steady 4% distribution ensures that your endowment can weather short-term emergencies, assuring you long-term sustainability.



## Consistency

**from sustainable, assured payouts from your fund.**

A guaranteed 4% payout is made each year for your organization's use: there is no need to apply for funds. Growth beyond the 4% distribution and WYCF's supporting fee are reinvested in your fund.



## Expertise

**of WYCF's experienced and caring team provides advice in communications, fundraising**

**and nonprofit management.**

WYCF provides nonprofit support in addition to managing your fund's administrative details. WYCF staff are available to offer a wide range of tools and advice.



## Versatility

**in accepting an exceptionally wide range of gifts into your fund.**

We can accept simple and complex gifts to provide diverse options for your donors. Examples include real estate, personal property, IRA distributions, and mineral rights.



## Supporting Fees

Percentages are established by the WYCF board and will not exceed the figures listed below.

Fund Type	Under \$1M	\$1M to \$3M	\$3M+
Designated Agency Fund	1.75%	1.25%	1%

# WYCF as a Resource for Your Organization

## Communications Toolkit

- Expertly written sample texts for diverse needs
- Endowment appeal letter templates & other solicitation tools
- Social media templates and visuals
- WYCF-branded estate-planning tools to help your donors give to your endowment
- Advice on endowment fund solicitation and growth

## Fund Management

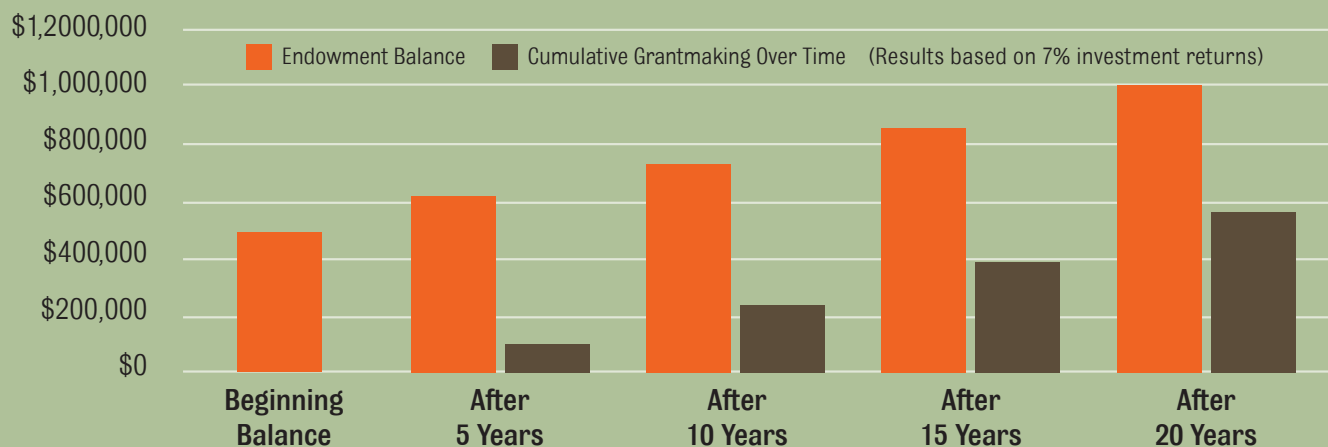
- Regular 4% payouts are calculated over 20 quarters of the fund's balance
- We provide fund statements, and include your fund in WYCF's 990s and audits
- Our fiduciary responsibility allows you to avoid liability
- Our investment and spending policies apply to you, so you won't need to create your own
- Your endowment is managed by our experienced investing committee
- We can assist with creating other documents, such as gift acceptance policies

## Development Training Sessions

- Fundraising
- Endowments
- Governance
- Planned Giving
- And more...



## The Power of Endowment



“ We have had a wonderful experience with WYCF. Throughout all the stages of the endowment process, staff have been more than accommodating with answering questions, meeting with board members, and helping us brainstorm ideas. They have helped make what could be an overwhelming process, seamless and easy. ”

– Mary Melaragno, Executive Director, Youth Emergency Services Foundation



“ I am thankful that the Pinedale Fine Arts Council started a Designated Agency Endowment Fund over 20 years ago. The regular interest that it generates allows us to provide more programming for youth in Sublette County. Having an endowment is also a plus when applying for grants, as it lets funders know that we are a stable, long-term organization. ”

– Tim Ruland  
Executive Director, Pinedale Fine Arts Council



WYCF works with Mason Investment Advisory Services to manage our funds. Mason manages over \$10.7B in assets for institutions and private clients nationwide. Mason’s institutional practice manages over \$4.5B in assets for more than 75 clients. Of Mason’s institutional practice, community

foundations make up the largest portion of both their assets (over \$2.5B) and clients (46).

Contact us to learn more:



1472 N. 5th St.  
Laramie, WY 82072  
www.WYCF.org

**Jerrica Becken**

Jerrica@wycf.org  
Director of Philanthropy  
(307) 721-8300

**Vickery Fales Hall**

Vickery@wycf.org  
Director of Donor Relations  
(307) 721-8300