

The Community Foundation of the Mahoning Valley offers the following support services and benefits to our agency fund holders:

### PUBLICITY AND MARKETING

Enjoy the increased visibility provided by being a part of our larger giving community. Here's how we shine the spotlight on your fund:

- A custom URL for donating directly to your endowment fund that can be shared with your donors in print materials as well as on your website and social media
- Recognition on the Community Foundation's website with a direct link to donate to your fund
- Reminders sent to our donor- advised funds three times a year on how they can contribute to your fund
- A quick guide to promoting your agency fund to help publicize to your donors and market your endowment fund
- New fund listing on our newsletter distributed to more than 1,600 via email as well as recognition on the electronic version of our annual Community Report

### DEVELOPMENT AND DONOR SERVICES

Take advantage of expanded gift acceptance, planned giving and development support. Here are a few ways we can help you grow your fund:

- Expanded giving vehicles— we can often facilitate even the most complex planned gifts including appreciated stock or real estate
- Gift processing and tax acknowledgments
- Counsel to your staff on endowment building and the benefits of having dependable, perpetual income for your organization
- Strategic donor engagement advice to complement and enhance your development plan, including planned giving and major gift asks
- The stability and long-term security of the Community Foundation can be attractive to donors interested in having their gifts endowed forever

### FINANCE AND ACCOUNTING

Let us do the work for you. By holding your agency fund at the Community Foundation, you benefit from the accounting, reporting and investment economies of scale of a \$74 million charitable foundation.

- Professional oversight of all your fund's assets from Clearstead, an independent investment consultant that specializes in nonprofit funds management, and a dedicated investment committee comprised of financial and business professionals each of whom has extensive experience in the investment and financial services industries.

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- Up-to-date information available 24/7 on our online fund holder portal, DonorCentral, including fund balances, investment activity, quarterly fund statements as well as itemization of all contributions and distributions
- Monthly reconciliation of all invested balances
- Custom and timely reporting for agency management, auditors and other groups upon request
- Presentations to agency management, committees, and current and potential donors about your fund and finances
- Our organization holds investments with multiple local institutions, rather than one individual financial or investment firm. This affords us the ability to compare performance, and ensure your fund is achieving superior investment returns. We also have access to aggregated data available through our work with Clearstead to evaluate performance against like-sized charitable institutions
- By pooling assets, your organization enjoys the leverage, economies of scale and diversification unavailable to smaller, independent endowment funds. Your funds are also invested with other charitable assets, many from organizations with charitable missions and goals that align with your own work
- CFMV's annual recommended distribution rate (currently 4.5% applied to a 12-quarter rolling average) protects the long-term value of our endowment funds, promotes growth and buffers against market volatility

## PARTNERING WITH A PUBLIC CHARITY

Continued consolidation among financial institutions means even the most community-minded bankers and advisers cannot guarantee their clients' funds will always be managed locally. Community Foundation funds, however, provide that local anchor forever. Serving the Mahoning Valley and governed by a board comprised solely of local community leaders, the Community Foundation will always provide charitable impact here.

Additionally, partnering with a public charity, rather than a for-profit financial firm, ensures your charitable objectives are mirrored in the work of the Community Foundation. Rather than contributing to shareholders' returns, your organization is supporting CFMV's grantmaking, capacity building for nonprofits and community leadership projects, all of which impact the Mahoning Valley and those you serve each day.

## A HIGHER STANDARD

The Community Foundation is the only Foundation in the Mahoning and Shenango Valleys to receive National Standards accreditation from the Council on Foundations, indicating that we have met the most rigorous standards in philanthropy. It affirms our commitment to financial security, transparency and accountability and says our grantmaking includes an open, competitive process designed to address the changing needs of our community. The National Standards Seal also confirms our history of honoring donors' wishes.