



Interested in an **AGENCY FUND?**

An **Agency Fund** at Triangle Community Foundation provides your organization a place to invest its operating reserves or existing endowments, allowing your organization to focus on its mission rather than investment management and administration. Agency funds enjoy our professional investment management to help the longevity of your organization. We believe in a strong local ecosystem of nonprofits, and protecting an organization’s legacy is one of the ways that happens.

How it Works:



Give

Make an irrevocable contribution of \$10,000 to open a non-endowed fund, or \$50,000 to open an endowed fund.



Grow

Invest the fund using diversified pools managed by specialized investment managers.



Connect

Enjoy the offerings of the Foundation to support the capacity of your organization.



Grant

Request distribution from the fund or set up annual distributions.

Advantages

- Access to diverse investment options to grow the fund's assets
- Secure online access to review fund balance
- Opportunities to attend Foundation hosted events

Quick Facts

- Fund Balance to Maintain:
 - \$10,000 (Non-endowed)
 - \$50,000 (Endowed)
- Minimum Distribution Amount: \$250
- Annual Administrative Fee: 1% first \$1 million, \$300 minimum annual fee
- Annual Investment Fees range from 0.4% to 0.9% depending on the investment portfolio selection.