

## How does The Miami Foundation Partner with Nonprofits?

The Miami Foundation offers an easy way to broaden your organization's ability to provide for its current programs and future. Whether your organization is preparing for their short term or long term needs, we have the solution.

## What is the difference between an Endowment and Reserve Fund?

An Endowment Fund is a permanent pool of assets which will grow over time, while providing you with a steady and reliable income stream each year. We ensure that the Fund's principal will not be spent down so your goal of perpetuity is maintained. A Reserve Fund may act like an endowment because an organization chooses not to touch the principal for general operating expenses. However, the principal is fully expendable back to the organization should emergency needs arise. Many of our partners have both types of Funds.

## How does it work?

**TALK** options with your Board to determine best vehicle for your desired spending and investment preferences.

**MOVE** assets from your organization or have your donors give directly to the Fund to receive an immediate tax deduction.

**UPDATE** your Board on investment growth and take advantage of professional development opportunities to help your organization succeed.

## Six reasons to choose our Organization Fund

- **PROFESSIONAL INVESTMENT MANAGEMENT:** Select from a diverse pool of high-performing assets at a low cost. Our investment manager is available to meet with your Board at any time to review asset allocations and strategy.
- **RELIEF FROM ADMINISTRATIVE BURDEN:** We handle all accounting, reporting and legal requirements.
- **LEGACY BUILDING:** Demonstrate to your donors a commitment to sound long-range financial planning while providing a secure source of income for your organization should it be needed.
- **PHILANTHROPIC SERVICES:** Our professional staff provides assistance for structuring, accepting, and managing complex, major, and planned gifts. Lean into Foundation's best practices when creating or amending your policies, e.g. gift acceptance, investment policy statement, etc.
- **NETWORKING:** We provide opportunities for your organization to build and leverage relationships with our Fundholders through exclusive networking events.
- **CAPACITY BUILDING:** Highlight your organization through unique marketing opportunities such as our blog, newsletter, etc. Our annual education event provides best practices and timely content on topics affecting the philanthropic sector.

## Open your Organization Fund today!

Establish your Fund by completing a short agreement and making a contribution. The Endowment Fund minimum is \$25,000 and the Organization Reserve Fund minimum is \$5,000; the annual philanthropic fee begins at 1% of the average balance or \$400.

- **VISIT** [miamifoundation.org/philanthropic-services/for-nonprofits](http://miamifoundation.org/philanthropic-services/for-nonprofits)
- **DOWNLOAD** and complete the agreement. Email to Bruno Borges, VP of Philanthropy, [bborges@miamifoundation.org](mailto:bborges@miamifoundation.org)
- **ACCESS** your online account after receiving your welcome packet (normally sent within 48 hours)