



LCF has tools and services available to help nonprofits and houses of worship establish long-term financial stability.

Expendable Funds

Expendable funds can be used when and how the nonprofit sees fit. They remain secure and under our stewardship until you need them. The nonprofit recommends how conservatively or aggressively LCF invests its expendable funds.

- Your nonprofit can invest its cash reserves and enjoy the benefit of investment within a larger portfolio, while ensuring the funds remain entirely available to your organization as needed.
- You may choose between four investment pools.
- You may add to your fund or request a grant at any time.

Your Mission. Our Investment Expertise. Together for Good.

AGENCY FUNDS

When you create an agency fund at Lincoln Community Foundation, we help you establish a dependable revenue stream and invest for the future. An agency fund provides access to our professional investment program, allowing your nonprofit to transfer responsibility for asset investment and management and ensuring more time for your mission and programs.

LCF offers both Expendable (most common) and Endowed Agency Funds.

Endowed Funds

Endowed funds are permanent investments managed by LCF on behalf of your nonprofit, so the fund may grow over time. The LCF board sets the distribution rate, designed to preserve and grow the original value of the fund.

- Building endowment is an important part of ensuring a nonprofit's long-term financial stability. By partnering with LCF, nonprofits benefit from our experience and knowledge of endowment building and complex giving strategies.
- You gain access to LCF's professional money managers at a cost-effective rate, and your assets are pooled within a larger portfolio.
- Your nonprofit will receive a distribution annually, supporting your programs forever.
- You demonstrate to your donors a commitment to long-range financial planning.

“When the YWCA sold a building, we wanted to preserve the proceeds to support future operations. So we chose to create an agency fund at LCF. It has helped to inspire confidence from our board and donors knowing that LCF is prudently managing these funds to provide a reliable source of support for the YWCA. “

– Karen Bell-Dancy, Executive Director, YWCA of Lincoln



“Our partnership with LCF has been a total win-win for the church. Rather than operate our own foundation for our endowed funds, LCF holds and invests our funds. We gain from their investment strategy and full plate of services provided to donors. As a senior minister, I would highly recommend that any church with reserve or endowed funds consider the great synergy of a relationship with LCF.”

**- Pastor Jim Keck,
First Plymouth Church**

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BOTH OPTIONS PROVIDE

- Access to a larger diversified investment portfolio. With invested assets of more than \$__ million, LCF provides significant diversification in addition to a favorable fee structure.
- Professional oversight of investment managers. All investments are pooled with other LCF funds in a sophisticated program directed by LCF's finance committee and Board of Directors.
- Freedom to pursue your mission. Our investment expertise enables your board and staff to focus on other things, such as your mission and programming, and your fundraising strategies.
- Easy and transparent access to your fund. LCF provides secure online access to your fund information.

GIFT PLANNING SERVICES

LCF can help you connect with your donors as they endeavor to create meaningful legacy gifts for your organization.

Funds designated for the benefit of your nonprofit may be created by a single donor or established and added to by multiple donors. Funds with a balance of \$30,000 or more are invested in LCF's endowed pool, and distributions are made annually. These funds also provide a way for donors to give complex gifts such as stocks, life insurance or property.

We can help you work with donors to make these gifts and can also help facilitate stock or real estate gifts. Additionally, our staff are available to provide charitable giving education to your staff and board.