

## Nonprofit Organization Endowment Fund Agreement

Thank you for choosing Rose Community Foundation as your partner in philanthropy.

**Name of Fund:** \_\_\_\_\_ (the "Fund")

Please note that the Fund name will often be listed in Rose Community Foundation publications unless you request anonymity for the Fund.

**Amount of Contribution (for new funds only):** Please indicate the amount of your initial contribution and how it will be paid. Additional contributions to the Fund may be made by the Nonprofit Organization at any time.

\_\_\_\_\_ (\$25,000 minimum)  
Amount (or estimate)

- Check or cash
- Marketable securities
- Other \_\_\_\_\_

### Nonprofit Organization Information:

Name \_\_\_\_\_  
(the "Nonprofit Organization")

Mailing Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Executive Director/Chief Executive Officer \_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_

Chair of the Board \_\_\_\_\_  
Mailing Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Phone \_\_\_\_\_  
Email \_\_\_\_\_

**Distributions:** The Fund is established solely to support the operations of the Nonprofit Organization, and it is intended that the principal of the Fund will be preserved in perpetuity. An annual distribution from the Fund will be made to the Nonprofit Organization in accordance with the following:

*Please indicate the amount of the annual distribution that should be made from the Fund:*

- Distribute \_\_\_\_\_ % of the value of the assets of the Fund
- Distribute up to \_\_\_\_\_ % of the value of the assets of the Fund, in such amount as the Nonprofit Organization may direct in writing

**Investment Options (for new funds only):** Nonprofit Organizations establishing a nonprofit organization endowment fund may choose how the Fund will be invested and may change the fund allocation on an annual basis. Please select an option below.

- Use Rose Community Foundation's Asset Allocation (Excludes Private Capital)
- Use Rose Community Foundation's Asset Allocation (Includes Private Capital)
- Allocate funds to pools as follows:

<i>Equity Pool</i>	_____ %
<i>Fixed Income Pool</i>	_____ %
<i>Money Market Pool</i>	_____ %
<i>Private Capital Pool</i>	_____ %
<i>Total</i> <span style="float: right;"><i>100%</i></span>	

**Acknowledgement and Signatures:** On behalf of the Nonprofit Organization, I acknowledge that I have read the Rose Community Foundation Nonprofit Organization Endowment Fund Guidelines (attached hereto and incorporated herein by this reference) and the Nonprofit Organization agrees to the terms and conditions set forth therein.

\_\_\_\_\_  
Name of Nonprofit Organization

By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: Executive Director/CEO  
Date: \_\_\_\_\_

By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: Chair of the Board  
Date: \_\_\_\_\_

**Acceptance:** Thank you for choosing Rose Community Foundation. We look forward to being your partner in philanthropy.

Rose Community Foundation

\_\_\_\_\_  
By: Lindy Eichenbaum Lent, President and CEO

\_\_\_\_\_  
Date