



# Nonprofit Endowed & Designated Funds

## Build Long-Term Stability for Your Nonprofit

A Nonprofit Endowed or Designated Fund at Rose Community Foundation helps your organization grow its assets and generate sustainable income. Created by nonprofits for their exclusive benefit, these funds can support general operations or fund a specific goal. For more than 30 years, we've partnered with nonprofits to help them plan for the future and strengthen their impact in Greater Denver.



### Invest With Confidence

Your fund is professionally managed in partnership with Cambridge Associates, a leading global investment firm. Our Chief Financial Officer and investment committee provide ongoing oversight of the portfolio to protect and grow your assets over time. We strategically manage investments to maximize returns while minimizing risks. Choose from three strategies – Growth Pool, Balanced Pool or Money Market Pool – based on what best aligns with your organization's goals.



### Get Personalized Support and Service

We offer more than investment management. Our team provides strategic guidance, administrative support, and unique opportunities for connection and growth, including:

- One-on-one coaching
- Learning cohorts with incentive grants
- Exclusive events and networking opportunities
- Long-term fund oversight and stewardship



### Connect and Grow

As a fundholder, you'll join a network of mission-driven organizations and benefit from Rose Community Foundation's 30 years of local partnerships and donor relationships.





## Join an Endowment Cohort

Our **Endowment Building Pathways** program offers step-by-step guidance to help you launch or grow your endowment and nurture a future-focused culture. Each pathway includes coaching, resources, training and peer connection:

- Launch Pathway
- Sustain Pathway
- Growth Pathway
- Momentum Pathway (for Jewish organizations)



## Fund Options

### Nonprofit Endowed Fund

- Designed to preserve principal in perpetuity and grow over time
- Annual distributions up to 5%
- Signals long-term sustainability to donors and community
- Ideal for planned giving and bequests

### Nonprofit Designated Fund

- Long-term growth opportunity with flexibility to access principal
- Choose a set annual distribution or request funds as needed



## Getting Started

Opening a fund is simple. Contact our Philanthropic Services staff to discuss your nonprofit's specific needs and goals for starting on your endowment journey.

## Contact Us

We're here to help. Let's talk about how we can support you.



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