

## Nonprofit Endowment Fund Expectations

When a nonprofit organization creates a permanent endowment fund at the Hartford Foundation, it ensures future stability and ongoing support. The fund becomes part of the Foundation's investment pool, and benefits from robust investment diversification and economies of scale. The Foundation handles all administrative responsibilities, including regulatory reporting, ensuring compliance and freeing the organization to pursue its charitable mission. The Hartford Foundation serves as a trustworthy and credible partner in an organization's endowment building efforts.

### EXPERIENCE YOU CAN TRUST

Each nonprofit endowment fund is assigned a dedicated staff person to serve as a fund contact to answer any questions you may have. You will decide the level of contact and assistance that you desire. Fund statements are mailed to your organization once a year. We recommend an annual meeting with our staff to review the fund activity; however some endowment funds request a deeper level of service we are happy to provide.

### GIFT ACCEPTANCE

Foundation staff will support the gifting process and work as closely as needed with you, your donors, and their advisors to answer any questions and facilitate a smooth transfer.

- We will serve as a resource to your staff when exploring complex gifts. Our staff has experience in negotiating and completing gifts of various assets. These include, but are not limited to, appreciated securities, closely held stock, real estate, life insurance, and gifts of qualified retirement plans.
- All gifts to an endowment fund are acknowledged and donors are thanked, regardless of the size of the gift, within five days of receipt.

### PROMOTING THE FUND

Foundation staff can assist with the writing of technical pieces for your organization's newsletter, brochures, and website pages. Foundation staff can help your organization develop strategies to grow the endowment and promote planned giving vehicles within your donor community.

- The Foundation conducts ongoing workshops with a specific focus on endowment funds.
- The Foundation provides technical presentations for you upon request. Presentations can be crafted for groups of donors, your board and staff, and professional advisors.

### PLANNED GIFTS

The Foundation's Charitable Gift Annuity program is available to your organization and our planned giving professionals are available to assist you as needed. All planned gift donors to a nonprofit endowment fund become members of the Foundation's 1925 Legacy Society and receive the benefits of membership.

### CONTACT

For more information about our Nonprofit Endowment Funds, visit our website at [www.hfpg.org](http://www.hfpg.org) or contact Deborah Rothstein, J.D., Vice President for Development at 860-548-1888.