



NONPROFIT FUNDS

For nonprofit organizations ready for an endowment.



Why create a nonprofit fund at GWCF?

Strengthen your organization's future.

A nonprofit fund at GWCF helps your organization build an invested reserve that supports your mission over time. Instead of managing an endowment alone, you gain access to professional investment management and long-term stewardship.

Focus on mission, not administration.

GWCF handles investments, recordkeeping, compliance, and donor acknowledgments so your team can focus on serving your community. Fees from your fund are reinvested back into the region you serve.

Flexible support that grows with you.

Nonprofit funds can be endowed or not endowed based on your needs. You choose how and when to request distributions, with transparent online access to performance and distribution data to help you plan confidently for the future. We support your long-term planning with clear reporting and guidance.

IMPACT AT A GLANCE

In 2025

105

nonprofit funds at the Foundation

\$60M

in total nonprofit endowment assets

\$600K

average size of nonprofit endowment

\$2M

distributed in 2025

\$35K

average size of distribution

Getting Started

1 CONTACT US

Our team is here to support you, and any board members or trusted advisors you wish to work with. We'll take time to understand your **charitable goals** and help create a fund that aligns with your vision.

2 MAKE A GIFT

Nonprofit funds can begin making distributions once the balance reaches **\$10,000**. We accept a wide range of gift types, from cash and appreciated securities to more complex assets.

3 ESTABLISH YOUR FUND

Most funds can be established within **two business days**. We'll work with you to complete the fund agreement, coordinate any complex gifts, and document your story and purpose.



19 Carter Endowment Fund

In 2008, a group of neighbors came together with a shared dream: to preserve and transform the Old Methodist Church in the heart of Berlin into a community space open to all.

After a decade of renovation work, 19 Carter opened its doors to the public in 2018. Today, the historic 1887 building serves as a vibrant gathering place for people from all walks of life to connect through art, music, and shared experiences.

In 2024, 19 Carter established an endowment fund to support the organization's long-term operations and growth. The organization hopes to eventually fund a paid executive director position through the interest earned from this endowment fund.

EXAMPLES

\$300,000 Nonprofit Fund

ENDOWMENT FUND

A **\$300,000** nonprofit endowment fund functions like a traditional endowment¹, allowing you to withdraw up to **\$12,000 annually**, based on the Foundation's 4% spending policy.

With an average **6.5%** annual investment return over the past 10 years², your fund can grow while you request distributions.

¹Principal can be accessed with board approval.

²Average for Foundation's traditional portfolio. Past investment performance is not a guarantee of future results.

RESERVE FUND

A nonprofit reserve fund is not endowed, making the **\$300,000** gift and any investment returns earned fully spendable at your discretion.

SUPPORT FEES

0.75% of fund's total market value

Support fees are used exclusively to support the mission-based operations of the Foundation.

Investment fee: 0.05% to 0.75%, depending on portfolio.

“We looked at various possibilities ... but decided to go with GWCF because they offer support for **meeting with our donors**, they know our **geographic area**, and they have **financial expertise** that we currently don't.”

Evy Dueck, Executive Director, 19 Carter



CONTACT

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