



AGENCY ENDOWMENT MATCHING PROGRAM

The Lodi Community Foundation is pleased to announce a limited time opportunity for nonprofit organizations to establish or grow an endowment with matching funds. The purpose of the **Agency Endowment Matching Program** is to provide long-term support for local nonprofits.

MATCHING FUNDS AVAILABLE FOR A LIMITED TIME

A total of \$80,000 has been allocated for the Agency Endowment Matching Program. The amount of matching funds a single organization may receive is based on a tiered system.

Invest a minimum of \$25k to establish an endowment fund or add to an existing one.

Grow your fund over time and use distributions to fulfill your mission.

Provide financial security to your organization for decades to come.

Deposit

\$25,000 - \$99,999

Receive Matching Funds of **\$2,500**

\$100,000 - \$999,999

Receive Matching Funds of **\$5,000**

\$1,000,000 and up

Receive Matching Funds of **\$10,000**



BENEFITS OF AN AGENCY ENDOWMENT FUND

- Stability and Budget Planning: Endowments provide nonprofits with the ability to better manage financial assets, forecast for future budgeting and operational needs, and be in a position to navigate new challenges surrounding uncertainty as well as times of growth.
- Prudent Investment Management: An agency endowment fund enjoys the advantage of being invested in the Foundation's larger pool of assets that are professionally managed. The Foundation provides fiscal oversight as well as accounting and financial reporting.
- Gift Acceptance Expertise: The Foundation works with your organization, and its donors and advisors on accepting gifts of cash, stock, real estate, and planned gifts into the agency endowment fund.
- Administrative Support: The Foundation provides all administrative and record-keeping support related to agency endowment funds, including sending gift acknowledgment letters/tax receipts to donors, providing fund statements for board reporting and tax filings/audits.

LODI COMMUNITY FOUNDATION

P.O. Box 1327 | Lodi, CA 95241 | (209) 910-3523 | www.lodicommunityfoundation.org



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ELIGIBILITY FOR AGENCY ENDOWMENT FUND

To be considered for the **Agency Endowment Matching Program**, an organization must meet all of the following criteria:

- Must be a 501(c)(3) nonprofit organization in good standing with the IRS with a valid Employee Identification Number (EIN).
- Primary offices located in Lodi.
- Serving residents of Lodi.
- Agency Endowment Fund must be opened at or held at the Lodi Community Foundation*
**The Lodi Community Foundation is an affiliate of the San Joaquin Community Foundation, and as such, the Fund must remain with the San Joaquin Community Foundation for at least 5 years, or your organization will forfeit the total amount of the matching grant (vesting period).*
- The minimum opening balance for an Agency Endowment Fund must be at least \$25,000 (same amount applies to existing endowments that are adding to their fund at the Foundation).
- Organizations are only eligible to receive a single endowment matching grant from the Foundation (for example, once the maximum endowment matching grant amount has been met, the same organization cannot apply for another endowment matching grant).
- A grant agreement for the Agency Endowment Matching Program must be signed by the approved nonprofit organization and the Lodi Community Foundation/San Joaquin Community Foundation prior to the matching grant being secured.



HOW TO APPLY

For questions about the Agency Endowment Matching Program, and to apply, or to request more information for your organization, please contact:

Louis Ponick
Board Member
Lodi Community Foundation

[\(209\) 943-2375](mailto:lpn@sanjoaquincf.org)

