



Agency Funds

Community West Foundation offers an investment program to provide professional management and donor gift processing for non-profit agencies in our services area. This program is designed to help them enhance and increase impact upon their constituents. In order to be effective, a minimum of \$250,000 in investment assets are required to open an Agency Fund.

Fund Management:

- Reduced advisor fees
- Lower fees on investments
- No administrative fees

Often times an agency, church or private foundation may need professional investment advice and management but find these services expensive or difficult to manage. By joining with Community West, agency funds are co-mingled and professionally managed. Agencies can share in significantly reduced advisor fees and lowers fees from individual investments. This support is provided while paying no administrative fees to Community West.

Operational Support:

- Quarterly portfolio progress reports are provided to each participant
- Simple request form for distributions
- Payment of request within three business days
- Additional funds accepted on a rolling basis

You Choose:

1. Community West can receive your donations, deposit to your fund and thank donors on your behalf
2. You process your own donations and then send Community West a check to deposit into your fund
3. Planned giving support is also available through Community West

If interested, contact Dan Roth, Chief Financial Officer at 440.360.7357 or Daniel.Roth@cwfc.org