

SPECIAL SERVICES AND RESOURCES

AGENCIES WITH ENDOWMENTS AT INNOVIA FOUNDATION

An agency fund is an easy way for a nonprofit organization to establish an endowed fund. This eliminates administrative burden and increases the ability to handle large and complex gifts.

We believe in the long-term viability of nonprofit organizations that serve our region, and that robust, diversified endowments ensure the longevity of our agency partners. Innovia helps agencies grow their endowments to support their missions and pools investments with our total assets for maximum return in our community.



PLANNED GIVING SUPPORT: Innovia Foundation's gift planning staff provides personal and confidential support and services to donors wishing to make a planned gift to any fund we manage. We can serve as your nonprofit's planned giving professionals to help you build your fund with non-cash gifts and unique assets, such as [retirement funds](#), [real estate](#), [life insurance](#) and [charitable trusts](#).

PLANNED GIVING TOOLS: Sometimes the biggest challenge people face is knowing how to [get started](#) with their estate planning. Innovia is pleased to provide an [estate planning toolkit](#) and [online tools for planned giving](#). This includes language for a gift in a [will](#) or [beneficiary designation](#), tips for accepting [gifts of real estate](#), guidance for [life insurance](#) gifts and [retirement fund rollovers](#), [charitable trust calculators](#) and much more.

ADMINISTRATIVE SUPPORT: Innovia takes care of all the administrative work of processing gifts of cash, securities, retirements funds and complex planned gifts to your fund. We send accurate and timely gift acknowledgment letters directly to the donor for tax purposes and memorial cards to families. We provide a link to our website for [online gifts](#) to your fund. Postage paid **remittance envelopes** are available for your donors. By giving through Innovia, our staff allows you to do what you do best: serve our community.

PUBLICITY: We promote nonprofits and agency funds at Innovia through stories on our [website](#), in our [annual report](#), annual meeting, [annual newsletter](#), e-newsletters and social media.

PROFESSIONAL ADVISOR OUTREACH: We reach out to attorneys, accountants, wealth managers and trust officers in our region to provide [planned giving resources](#) and explore ways to benefit their clients who have charitable intent. Many attorneys look to us first when their clients have charitable interests, because we support **all** charities and they avoid any appearance of favoritism.

NONPROFIT CAPACITY BUILDING AND LEADERSHIP DEVELOPMENT: Innovia delivers monthly e-news with topics that impact the nonprofit sector and our region. We host educational events on topics important to nonprofit organizations and to provide resources to help you grow your funds.

FUND ACTIVITY: Using a special username and password, agencies with endowments at Innovia can easily log in through our secure website to view a list of all gifts to your fund, fund balances and distributions.

5% CAMPAIGN TOOLS FOR TRANSFER OF WEALTH: To grow permanent endowments for communities and nonprofits, Innovia commissioned a Transfer of Wealth study that demonstrates nearly \$42 billion will transfer generationally in the coming decade. A 5% campaign has been launched to inspire our region to retain and reinvest wealth for the permanent benefit of communities and nonprofits. More details can be found at www.innovia.org/5percent.