

Simplify Your Nonprofit's Fund Management by Partnering with a Trusted Community Partner

The Dallas Foundation partners with nonprofit organizations that want to take advantage of the fund management capabilities of the Foundation. This relationship allows you to remain focused on the work that helps fulfill your mission, without the burden of back-office administration, confident in the knowledge that you are working with a trusted fiduciary. The Dallas Foundation may hold nonprofit funds from many different types of organizations as well as collaboratives organized for charitable purposes.

When you open a nonprofit fund with us:

- Your organization will retain flexibility in the use of grants, using funds in a way that advances the mission.
- Your organization benefits from our investment expertise – professional fund management and disciplined adherence to our investment policy, asset allocation, and rebalancing.
- You have access to a large investment pool that includes asset classes otherwise unavailable to some organizations and lower investment fees.
- Our operational efficiency in handling accounting, monitoring the fund and staying up to date with endowment laws and best practices frees you up to focus on what you do best.

ENDOWMENT FUNDS

An endowment fund provides long-term security by creating a permanent, customizable funding source that helps you meet your long-term goals. Once established, the fund generates income that is distributed to your agency for operating expenses or special needs.

In such funds, the Foundation serves as the guardian of the fund, protecting permanent assets from possible future board neglect, shortsighted invasion, or improper use. As volunteer boards have varying degrees of financial expertise and often change over time, having an endowment at the Foundation provides more consistency and continuity in the stewardship of your funds, allowing your charitable purpose to be preserved in perpetuity.

NON-ENDOWED FUNDS

These Funds can meet numerous needs including, Capital Campaign Funds, Operating Reserve Funds, or general Cash Management Funds. Our investments expertise allows us to offer a customizable solution to your unique investment needs and time horizons.

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