



Top Ten Special Services for Nonprofits

➤ **We make endowment management easy and so much more**

We follow established best practices for endowment management including:

- an endowment distribution policy that complies with state and national requirements (i.e., the Uniform Prudent Management of Institutional Funds Act or UPMIFA);
- 13 nationally recognized investment managers that specialize in long-term endowment management;
- a Finance/Investment Committee of experienced financial managers; and
- an investment consultant monitoring fund managers' performance against benchmarks.

➤ **We promote your Fund**

1. **Publicity** of nonprofit organizations in our annual report and, on occasion, in our annual calendar, semi-annual newsletters, semi-annual e-newsletters and television public service announcements.
2. **You Pick for Charity online interactive game** at inwcf.org features two local nonprofits with endowments at INWCF. Designed to build awareness of agency endowments at INWCF, we provide a press release nonprofits can use to encourage supporters to pick a bushel of apples for their charity. At the end of the month, the game sponsor, Intermountain Community Bank Trust & Wealth Management, provides grants of \$250 and \$100 to the champion and second place finisher.
3. **Lunches with the Foundation** for professional advisors. As of March 2011, INWCF's president & CEO and director of gift planning have met with 230 professional advisors in our region to introduce them to INWCF and explore ways we can work together to benefit their charitable clients. Many attorneys look to us first when their clients express a charitable interest since we support all charities and they can avoid any appearance of favoritism or conflict of interest.

➤ **We make giving easy**

4. **Online giving and fund activity** at inwcf.org provides people the option to select an online gift of any size to your agency fund at INWCF. We provide the gift acknowledgment directly to the donor. Using a special username and password, the agency can view a list of all gifts made to their fund online. Fund balances and a list of distributions made from a fund are also listed.
5. **Remittance envelopes** for gifts of cash are available. Return postage paid envelopes provide the donor all the information they need to make a cash or credit card gift in memory or in honor of a loved one. The envelope also provides information about how to make a gift of stock/securities or to request planned giving information.
6. **Broker information** is available for transferring gifts of securities directly to a fund at INWCF.

➤ **We can be your agency's planned giving professional**

7. **Legacy Society packets** designed to help nonprofits introduce the topic of planned gifts are available to all nonprofits with endowments at INWCF. (This is in production to be available in September.) The packet includes **language for a codicil or a will**, a list of agencies with endowments and also includes a list of **legacy society donors**.
8. **Gift planning support** and services to your donors wishing to make a planned gift.

➤ **We host special meetings for you**

9. **Annual meeting for nonprofit agencies** with endowments at INWCF is held in late September to provide you with updates from INWCF's directors of grants, finance and gift planning.
10. **Free special workshops** provide nonprofits assistance in building their endowments. (Previous topics include: Social Entrepreneurship, Accepting Gifts of Life Insurance, Using Social Media and Earned-Income Strategies for Nonprofits.)