

Types of Endowment Funds

There are a number of options for your donation to be allocated within CFSEA's Endowment Fund:

Smart & Caring Funds

Smart & Caring Funds respond to the ever-changing needs of our region now and for generations to come. Investment income is distributed through a granting process. Any size donation is welcome, however you can create a named fund with a minimum gift of **\$1,000**.

Designated Funds

Choose your favourite registered charitable organization(s) and each year the investment income will be dispersed to that organization(s). A Designated Fund may be created with a minimum gift of **\$5,000**.

Field of Interest Funds

Field of Interest Funds support your charitable areas of interest, while still responding to our region's greatest needs. Examples of Field of Interest include: the arts, youth, seniors, health, the environment, etc. CFSEA Grants Committee allocates these funds to the most suitable area identified by the donor. Field of Interest Funds may be created with a minimum gift of **\$10,000**.

Donor Advised Funds

Donors advise the Foundation each year as to which charitable organization(s) are to benefit from the investment income from their fund. Donor Advised Funds allow the opportunity for the donor to match their philanthropic wishes each year. Donor Advised Funds may be created with a minimum gift of **\$15,000**.

Scholarship Funds

Donors can establish specific Scholarship Funds to support Southeastern Alberta students in their educational pursuits. Donors determine the scholarship criteria, including student characteristics and specific school district(s). CFSEA issues the scholarship amount annually to the school district(s) as directed by the donor. The school district in turn selects the recipients based on the donor's criteria. Scholarship Funds may be created with a minimum gift of **\$15,000**.

CFSEA Operations Endowment Fund

CFSEA has ensured its ongoing administrative operations with the establishment of a specific Endowment Fund. Secure funding is crucial to the continued growth, leadership and impact of our Foundation, but also provides the administrative support to managing all of our Funds and activities. We invite every donor to consider allocating a portion of their gifts to the sustainability of the Foundation in the range of 10-15%.

Agency Funds

CFSEA manages two streams of Agency Funds:

- 1) *Agency Endowment* – Investment income from their permanently endowed funds are issued back to the agency. [Click here](#) for more information.
- 2) *Agency-Managed Funds* – CFSEA holds agency funds on a temporary basis, allowing agencies to benefit from our investment management and administrative support.