GREATER HORIZONS℠

# AGENCY FUNDS

## *Helping Nonprofits Invest Mission-Critical Dollars*

**Build a Sustainable Financial Future with an Agency Fund**

Your nonprofit organization can build long-term assets and establish a home for reserves at Greater Horizons. Greater Horizons leverages more than forty years of experience and billions in assets to offer nonprofit organizations a reliable, cost-effective option for long-term investments.

Today, hundreds of 501(c)(3) public charities trust Greater Horizons with more than $200 million in agency funds. These organizations come to us for third-party oversight of their assets and enjoy connecting with our philanthropic advisors and investment professionals to access our unique industry expertise.

**What You Receive with an Agency Fund**

▶ Access to low-cost investment options
▶ Personal service from philanthropic advisors and investment professionals
▶ 24/7 online access for staff and volunteers to view the fund balance, contributions and grants
▶ Monthly newsletter with investment commentary and philanthropic insights
▶ Education on trending charitable topics
▶ Annual investment review meeting

"For us, it was a no-brainer that our funds should be held at Greater Horizons. Involving a third party, especially one with such a good reputation, seemed like a good way to give donors confidence and eliminate the need to choose one investment firm over another."

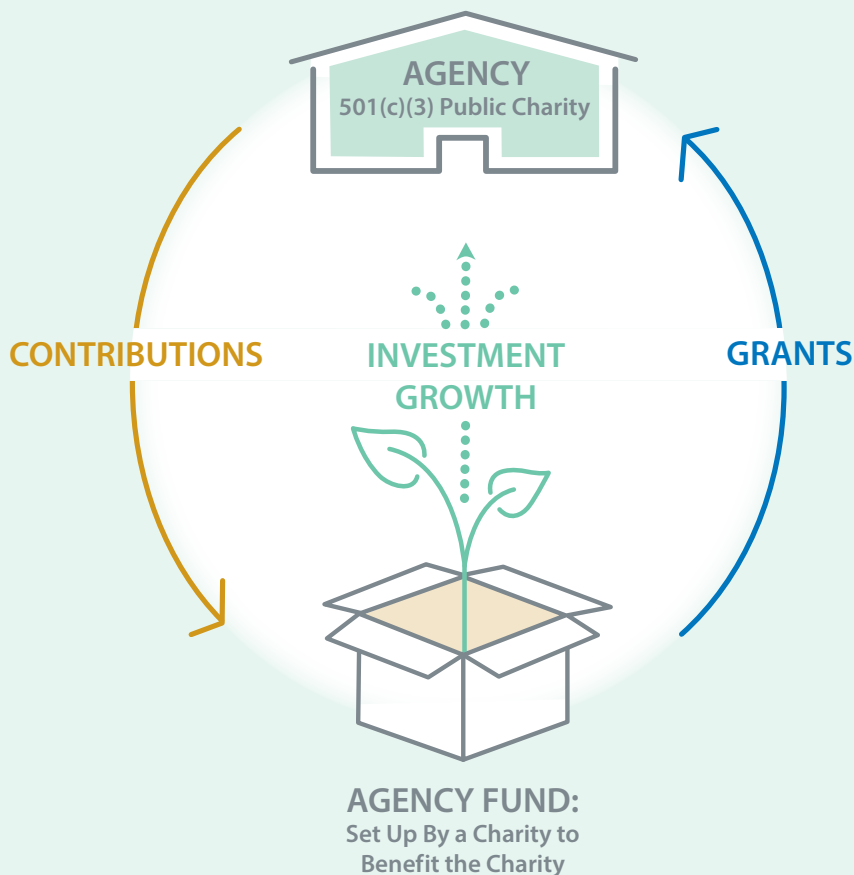– Jennifer Heinemann,
Operation Breakthrough

( MORE ➡ )

# AGENCY FUNDS
## *Continued*

### Invest Assets to Meet Your Objectives

When you set up an agency fund, you can select a custom investment mix that aligns with your organization's time horizon and risk tolerance. Greater Horizons' investment pools are low cost and diversified across multiple asset classes, and you can adjust your selections as needed to meet your investment goals. Our Board-appointed Investment Committee made up of seasoned local financial professionals oversees the investment pools.

**AGENCY**
**501(c)(3) Public Charity**

**CONTRIBUTIONS**

**INVESTMENT GROWTH**

**GRANTS**

**AGENCY FUND:**
**Set Up By a Charity to Benefit the Charity**

### How It Works

**1** Quickly and easily set up an agency fund with one simple document.

**2** Choose how you want to invest the fund's assets.

**3** Greater Horizons receives contributions from the agency to the fund and processes grants from the fund back to the agency.

**To set up an agency fund, contact us at info@greaterhorizons.org or 866.719.7886.**