

## AGENCY PARTNER PROGRAM

# Guidelines for Agency Partner Funds



The Community Foundation of the Ozarks welcomes funds established by nonprofit agencies in central and southern Missouri. To ensure that such funds comply with both the mission of the CFO and the requirements of the IRS, the following guidelines have been established.

### Distributions from 501(c)3 Agency Funds

As a verified 501(c)3 nonprofit organization, you may choose to make distributions from your CFO-held funds as you see fit. Your organization is fiscally responsible for distributions from your fund. Distribution requests can be made by email, fax or written request. Distributions must be made by the approved agency contact for the organization.

**Email requests:** [hbeadle@cfozarks.org](mailto:hbeadle@cfozarks.org)

**Fax:** (417) 864-8344

**Written request:** Community Foundation of the Ozarks, Attn: Holly Beadle

P.O. Box 8960 · Springfield, MO 65801

Capacity funds are not meant to be used as checking accounts. A nonprofit organization should maintain a separate checking account for operating expenses, day-to-day transactions and frequent needs. A capacity fund is meant to help a nonprofit work toward a specific goal, raise capital and build interest on reserve funds.

To view the fund activity, use Fund Manager to view the gifts and distributions from your agency funds.

### Adding Assets into your Agency Funds

There are a few ways to add assets to your agency fund:

- Checks can be mailed to the CFO. Checks may be written out to your agency's name, to the name of your fund, or to "Community Foundation of the Ozarks." Please include the fund that will receive the gift either in the memo line of the check or in a note mailed with it. Please do not endorse the check.  
**Mail to:** Community Foundation of the Ozarks,  
Attn: Finance Department  
P.O. Box 8960 · Springfield, MO 65801
- Credit card gifts may be received through the CFO into your agency fund. Donors may make gifts at [www.cfozarks.org/donate](http://www.cfozarks.org/donate). Donors indicate the fund name in the credit card donation process online. We can create a direct link to your fund's page upon request.
- A wire transfer or stock gifts may be made into your agency fund.
- For stock or wire transfer instructions, please contact Holly Beadle, Director of Philanthropic Services, at [hbeadle@cfozarks.org](mailto:hbeadle@cfozarks.org) or (417) 864-6199.

With all gifts that are made directly from a donor into a fund at the CFO, a gift acknowledgement will be sent to the donor. Credit card gift acknowledgements are provided via email immediately after the gift; all other gift acknowledgements are made by mail.



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