



# Simple. Targeted. High-Impact.

**AGENCY FUNDS** are faith-consistent investment funds for the beneficiary of your choosing such as a parish, Catholic school, or ministry. With an agency fund, you can set aside your gift now to support future capital needs or multi-year projects, reassuring the beneficiary that they have committed support for the work ahead. Once you open the fund, the Catholic Foundation handles the rest — investing the fund for growth through socially responsible investments and ensuring grant distributions honor your intentions.

## **GIVE TODAY FOR THE NEEDS OF TOMORROW**

If you are interested in making a significant gift to support a parish, school, or ministry and want to provide access to the funds over several years, an agency fund is a great option.

## **Benefits of an Agency Fund**

**Impact for Tomorrow** Your gift is set aside, ready for the beneficiary parish, school, or ministry to use when needed.

**Hassle-Free Stewardship** The Catholic Foundation stewards your gift and ensures that grants distributed from the fund align with your defined purpose.

**Faith-Aligned Investments** Our investment strategies align with Catholic teachings and are approved by the USCCB and the Michigan Catholic Conference.

**Diverse Gift Options** You can gift cash, securities, mutual funds, real estate, business interests, IRA-qualified charitable distributions, and more.

*“Give and gifts will be given to you; a good measure, packed together, shaken down, and overflowing, will be poured into your lap. For the measure with which you measure will in return be measured out to you.”*

*– Luke 6:38*



## How Does it Work?



### Give

Select a beneficiary and define a purpose to set up an agency fund through the Catholic Foundation with a minimum gift of \$50,000 and receive an immediate tax benefit.



### Grow

Choose from four investment pools to grow your charitable gift tax free through socially responsible investments. Once the balance is below \$10,000, funds will be held in a cash account.



### Grant

When the beneficiary has need of the funds for the defined purpose, they request a grant distribution with the Catholic Foundation. The entirety of the fund can be granted.



### Transform

With the fund, your generosity provides timely support to the beneficiary you care about, helping them meet immediate needs and carry out their mission in the near term with confidence and stability.

### ABOUT THE CATHOLIC FOUNDATION OF WEST MICHIGAN

The Catholic Foundation of West Michigan is an independent, 501(c)(3) Catholic community foundation endorsed by the Diocese of Grand Rapids and Bishop David J. Walkowiak. Established in 1995 by Bishop Robert J. Rose, the Catholic Foundation manages charitable funds and distributes grants for a variety of Catholic ministries throughout West Michigan.

### GUIDED BY CATHOLIC EXPERTISE

At the Catholic Foundation of West Michigan, we help faithful donors like you make the most of your giving. Our team understands the region's most pressing needs and ensures your gifts create lasting impact for the ministries, parishes, and organizations closest to your heart.

## Ready to make your giving simple, targeted, and impactful?

Contact us to receive a personalized illustration of how an agency fund could work for you.



**Teresa Reid**  
Executive Director  
(616) 333-1641  
treid@cfwmi.org

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*This information is educational in nature. It is not offering professional tax, legal, or accounting advice. For specific advice about the effect of any planning concept on your tax or financial situation or with your estate, please consult a qualified professional advisor.*

(616) 333-1640 | [info@cfwmi.org](mailto:info@cfwmi.org) | [catholicfoundationwmi.org](http://catholicfoundationwmi.org)