

# Assets Under Administration: Empowering Your Organization's Reserves

At the South Saskatchewan Community Foundation, we offer a specialized funds service designed to help organizations optimize their reserves through pooled investments. Our approach ensures that your funds remain under your control and accessible at all times while taking advantage of our expertly managed investment opportunities.

## KEY FEATURES:

- 1. Pooled Investments:** Pool your organization's reserves and benefit from a diversified investment portfolio carefully managed by our expert investment managers and overseen by our knowledgeable board of directors.
- 2. Control and Accessibility:** Maintain control over your funds and enjoy the flexibility to withdraw at your convenience, enabling seamless financial management.
- 3. Minimum Withdrawal Notice:** For withdrawals exceeding \$50,000, a minimum one-month notice is required. This practice ensures efficient management while accommodating your organization's financial needs.
- 4. Exclusively for Investment Pooling:** Please note that this fund is not designed to accept donations or grant out to various charities. Its sole purpose is to pool investments and grant back to your organization.
- 5. Low Administrative Fee:** Benefit from a low admin fee of 0.5%, ensuring cost-effectiveness in managing your funds.

## BENEFITS:

- **Diversified Investments:** Spread investments across various assets, reducing exposure to market volatility.
- **Professional Management:** We have expert third-party investment managers that apply strategic insights to maximize returns while aligning with our board-approved investment policy's financial objectives.
- **Liquidity and Control:** Retain the ability to access funds when needed while maximizing growth potential.

*"The Saskatchewan Archaeological Society shifted our long-term investments to a Community Foundation managed fund in 2018. We did this for two reasons. One was because the rate of return was higher and the fees were lower. More importantly though, we now had the peace of mind that experts were managing our funds and we could be assured they were making informed financial decisions. We are provided easy to understand quarterly reports, and we can access our funds when needed, with no penalty. It's a comfort knowing our funds are being looked after [by the Community Foundation] and the fees charged are helping support to the nonprofit sector."*

Dr. Tomasin Playford, Executive Director,  
Saskatchewan Archaeological Society

## HOW TO GET STARTED:

Contact our dedicated team to explore how our funds service can optimize your organization's reserves. We're committed to empowering organizations and building their success.



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