

Administrative Fee Schedule

The Community Foundation is about more than transactions; we are about transformation.

While fees collected for funds held at the Community Foundation support the processing of grant checks, accepting and acknowledging donations, completing annual audits and reporting, our fees also make you part of the change we enable in the communities we serve. It's the community convening, the strategic grantmaking, the donor connections, the nonprofit trainings and the promotion of charitable giving that ultimately transforms the communities we call home. Thank you for joining us.

FUND TYPE	MINIMUM INITIAL CONTRIBUTION	FEE
<p>CORPORATE/COMMITTEE GIVING FUND: For businesses and organizations to impact the community by distributing charitable dollars through a corporate or committee structure.</p>	NO MINIMUM	Minimum annual fee: \$250 Assets up to \$2M: 1.00% The next \$2M-\$5M: 0.65% The next \$5M-\$10M: 0.50% Over \$10M, flat rate on all balances: 0.25%
<p>DESIGNATED: To benefit specific organizations providing a stable income stream with scheduled annual distributions.</p>	NO MINIMUM	Minimum annual fee: \$250 Assets up to \$2M: 1.00% The next \$2M-\$5M: 0.65% The next \$5M-\$10M: 0.50% Over \$10M, flat rate on all balances: 0.25%
<p>DONOR ADVISED/FAMILY FOUNDATION: For individuals and families to support a variety of causes throughout the United States whenever you choose.</p>	NO MINIMUM	Minimum annual fee: \$250 Assets up to \$2M: 1.00% The next \$2M-\$5M: 0.65% The next \$5M-\$10M: 0.50% Over \$10M, flat rate on all balances: 0.25%
<p>FIELD OF INTEREST</p>	NO MINIMUM	Minimum annual fee: \$250 Flat Rate on all balances: 2.00%
<p>LEGACY: To receive your estate gift that will benefit your favorite charities in the future.</p>	NO MINIMUM	No fee until assets received from estate
<p>NONPROFIT: To serve as an organization's endowment to support future operations and programs.</p>		Minimum annual fee: \$250 Assets up to \$2M: 1.00% The next \$2M-\$5M: 0.65% The next \$5M-\$10M: 0.50% Over \$10M, flat rate on all balances: 0.25%
<p>ENDOWMENT: an endowment established with the Foundation with a long-term time horizon.</p>	\$50,000	
<p>INVESTMENT: a flexible fund established with the Foundation with a short or long-term investment strategy.</p>	NO MINIMUM	
<p>SCHOLARSHIP: To benefit a school or educational discipline.</p>	\$50,000	2%-5% Dependent on level of services provided

effective June 22, 2020

Additional Fee Information:

- Funds will be charged for any extraordinary direct expenses incurred on behalf of a specific fund (such as commissions for sale of contributed stock, legal fees, mailings, etc.).
- Additional fees may be assessed for other services such as complex gift acceptance, large numbers of transactions, special grant processing and review or other non-standard services.
- Please note this administrative fee schedule does not include investment fees. Investment fees will vary based upon the investment selection.
- Charitable funds utilizing Community Foundation staff for customized grant making procedures may have additional or separate fee structures.

Your Philanthropy
Our Community
Better Together