

Administrative Fee Schedule

FUND TYPE	MINIMUM INITIAL CONTRIBUTION	FEE
COMMUNITY IMPACT FUND: Support for unrestricted grantmaking to address our areas ever-changing community needs.	No Minimum	Flat rate on all balances: 2.00%
FIELD OF INTEREST: To support a particular area of charitable interest to make grants where there is the greatest need within the field of interest.	No Minimum	Minimum annual fee: \$250 Flat rate on all balances: 2.00%
CORPORATE/COMMITTEE GIVING FUND: For businesses and organizations to impact the community by distributing charitable dollars through a corporate or committee structure.	No Minimum	Minimum annual fee: \$250 Assets up to \$2M: 1.35% The next \$2M-\$5M: 1.00% The next \$5M-\$10M: 0.85% Over \$10M, flat rate on all balances: 0.60%
DESIGNATED: To benefit specific organizations providing a stable income stream with scheduled annual distributions.	No Minimum	Minimum annual fee: \$250 Assets up to \$2M: 1.35% The next \$2M-\$5M: 1.00% The next \$5M-\$10M: 0.85% Over \$10M, flat rate on all balances: 0.60%
DONOR ADVISED/FAMILY FOUNDATION: For individuals and families to support a variety of causes throughout the United States whenever you choose.	No Minimum	Minimum annual fee: \$250 Assets up to \$2M: 1.35% The next \$2M-\$5M: 1.00% The next \$5M-\$10M: 0.85% Over \$10M, flat rate on all balances: 0.60%
LEGACY: To receive your estate gift that will benefit your favorite charities in the future.	No Minimum	No fee until assets received from estate
SCHOLARSHIP: To benefit a school or educational discipline.	\$50,000	Endowed: 2.5% Non-Endowed or passthrough: 5%

Effective July 1, 2023

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 address investment fees. Investment fees will vary based upon the investment selection.

Charitable funds utilizing Community Foundation staff for customized grantmaking procedures may have additional or separate fee structures.