

# COMMUNITY IMPACT FUND

Established by a donor to support the changing community. The most flexible of funds, it grows with the community over time, allowing support of a variety of emerging needs and opportunities that come to the forefront for Lancaster County.

## BENEFITS

- Donor selects fund name and description at \$10,000 level
- Fund listing on Community Foundation's website
- Secure online giving—currently with no transaction fees (typically 3%) and personalized acknowledgments
- Professional investment management provided by PNC ([www.pnc.com](http://www.pnc.com))
- Planned giving and donation assistance with complex assets
- Annual fund report and favorable tax treatment

## MINIMUM CONTRIBUTION LEVEL -----

**\$10,000**

Can be achieved over five years; annual spending amount is reinvested until minimum is achieved.

## ACCEPTABLE GIFT TYPES -----

- **CASH/CHECK**
- **CREDIT CARDS**  
(via secure online contributions)
- **PUBLICLY-TRADED AND CLOSELY HELD SECURITIES**
- **BEQUESTS**  
liquid assets as well as tangible personal property and real estate
- **RETIREMENT FUNDS**
- **TANGIBLE PERSONAL PROPERTY/REAL ESTATE**
- **LIFE INSURANCE**

## FOUNDATION OVERSIGHT FEES\* -----

First \$1 Million	<b>1.50% OF FUND MARKET VALUE</b>
Next \$2 Million	<b>1.30%</b>
Balances Over \$3 Million	<b>1.10%</b>

\*Fees are pro-rated and charged monthly

## INVESTMENT FEES -----

**APPROXIMATE AVERAGE OF 0.18%;**

Investment returns are posted to funds net of investment management fees

## ANNUAL SPENDING POLICY -----

**TYPICALLY 3.5% OF  
BLENDED MARKET VALUE**

based on five-year rolling average of fund's market value

## PAYMENT POLICY -----

**ORGANIZATION(S) CAN APPLY THROUGH ANNUAL COMPETITIVE GRANT CYCLE OR ORGANIZATIONS CAN BE IDENTIFIED AND INVITED TO PARTICIPATE.**