Established by a donor to support a broad area of charitable interest, such as the environment, arts and culture, or a specific geographic area. The Foundation awards grants to charitable projects within the field of interest, and retains the flexibility to respond to changing opportunities within that field.

**FIELD OF INTEREST FUND**

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

**MINIMUM CONTRIBUTION LEVEL**

$10,000

**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**
- **TRUST BENEFICIARY**
- **LIFE INSURANCE**

**FOUNDER OVERSIGHT FEES**

<table>
<thead>
<tr>
<th>Amount</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>First $1 Million</td>
<td>1.75% of fund market value</td>
</tr>
<tr>
<td>Next $2 Million</td>
<td>1.55%</td>
</tr>
<tr>
<td>Balances Over $3 Million</td>
<td>1.35%</td>
</tr>
</tbody>
</table>

*Fees are pro-rated and charged monthly

**INVESTMENT FEES**

**APPROXIMATE AVERAGE OF 0.18%**

**ANNUAL SPENDING POLICY**

**TYPICALLY 3.25% OF BLENDED MARKET VALUE**

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

**GRANTING POLICY**

Organization(s) can apply through annual competitive grant cycle or organizations can be identified and invited to participate.

**BENEFITS**

- Donor selects fund name and description
- Secure online giving - currently with no transaction fees (typically 3%) and personalized acknowledgments
- Professional investment management currently provided by PNC (www.pnc.com)
- Planned giving and donation assistance with complex assets
- Favorable accounting treatment
- Annual statements

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