Community benefit organization transfers assets to the Community Foundation to create a permanent endowment fund. Other donors also can make contributions directly to the fund. The organization itself is the fund’s sole beneficiary.

**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
- Trust Beneficiary
- Life Insurance
- Charitable Gift Annuity Program to aid in your endowment building

**FOUNDATION OVERSIGHT FEES**

<table>
<thead>
<tr>
<th>First $1 Million</th>
<th>0.80% of Fund Market Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next $2 Million</td>
<td>0.70%</td>
</tr>
<tr>
<td>Balances Over $3 Million</td>
<td>0.60%</td>
</tr>
</tbody>
</table>

*Fees are pro-rated and charged monthly

**INVESTMENT FEES**

Approximate Average of 0.18%

**ANNUAL SPENDING POLICY**

4.0% of Blended Market Value

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

**ANNUAL GRANTING POLICY**

Organization notified of annual available to grant amount by March 31. Annual grant payment either granted to organization or reinvested at organization’s request.