



CHARITABLE DISTRIBUTION

\$1,000 minimum

- Not Invested
- Not Endowed
- Access to All
- Fee: 2% per gift

CHARITABLE DISTRIBUTION

QUASI-ENDOWED

\$100,000 minimum

- Invested
- Quasi-Endowed
- Access to All
- Fee: 1.25% annual

\$50k Immediately accessible
\$50k Accessible after 3 years

ENDOWED

\$10,000 minimum
\$25,000 minimum for advised scholarships

- Invested
- Endowed
- Access to 4% Spendable
- Fee: 1% annual

Spendable 4%
ENDOWMENT
(Permanent Investment)

Non-endowed funds offer flexibility

Endowed funds ensure perpetuity

This represents the fee structure for most funds — however, because of added administration, some scholarships are assessed different fees. The Community Foundation fee structure lowers at break points above \$1 million. Please reference a complete fee chart for relevant fund balances.

FOR MORE INFORMATION ABOUT CREATING AN ENDOWMENT FUND, CONTACT:

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