



Community Giving  
FOUNDATION™

# Designated Funds



Establishing a **Designated Fund** at the Foundation allows you to forever support the good work of a specific nonprofit organization. For the nonprofit, the fund creates a permanent income stream to support its mission and the opportunity for planned giving support and investment management services from the Foundation. You designate the nonprofit(s) you want to support when the fund is created, and Foundation staff automatically process the grants annually as long as the organization remains charitable, in operation, and consistent with its original purpose.

## How It Works

- You identify a nonprofit that you wish to support.
- You make a gift to the Foundation of cash, appreciated stocks, real estate, or other assets.
- You work with the Foundation sets up a fund in your name or the name of the nonprofit you choose.
- The Foundation takes care of all the administrative details and issues an annual grant to the designated nonprofit.



## Commitment To Social Equity

Even as a little girl, Carol was committed to interracial, intercultural, and interfaith understanding. She served in the Peace Corp, worked on social justice projects, and supervised foreign study programs in her higher education career. Carol's fierce commitment to the causes of justice led her to work closely with the Coalition for Social Equity, a local nonprofit. After Carol's passing, her husband established a designated fund to honor his wife's work and support the Coalition in her name forever.

## FEES:

Administrative Fee = 1.5%  
Investment Fee = 0.41%

## SPENDING POLICY:

Spending Policy = 4.5%

*(This determines the annual distribution amount to the agency.)*

## DISTRIBUTION (grant):

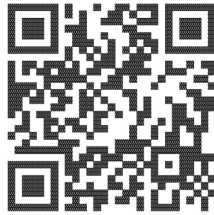
Annually, the Foundation will process a grant to the designated nonprofit based on the fund's available distribution.

## FUND BALANCE:

Designated Funds begin grantmaking when the fund balance reaches \$10,000. But you can start a fund for as little as \$500 with a plan to reach \$10,000 within five years.

## Foundation Fundholder Benefits

- Foundation will work with you on publicity to tell your community giving story and promote your new fund.
- An online donation option is created for your fund so your family, friends, and community can help it grow.
- You receive access to the Foundation's Advisor Portal, an online system that gives you access to data about your fund (like donations received, grants awarded, semi-annual fund statements, and other updates).
- Foundation staff stay in communication with fundholders throughout the year and host several events annually to celebrate community giving.



Learn more about creating your giving story. Scan the QR code for our Giving Workbook.

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A Designated Fund is an excellent way to give back to an organization that has touched your life. Your gift provides more than just funding - the nonprofit will benefit from the Foundation's investment stewardship and the opportunity for others to contribute to the fund. The Foundation can facilitate even the most complex forms of giving, such as planned gifts and gifts of appreciated stock. Your gift (and all future earnings from your gift) is a permanent support for the designated nonprofit and community, helping to do good work forever.



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