

# Fee Structure



We believe in providing clear, straightforward pricing to ensure you understand the cost of our services. Below is a breakdown of our fee structure. All funds are subject to a \$500 minimum annual fee. Fees are assessed at the discretion of the Community Foundation and may change over time.

## FUND TYPE

## ANNUAL ADMINISTRATIVE FEE

### DONOR ADVISED FUNDS

**Donors make recommendations regarding grant distributions.**

Endowment (Long-term Investment Pool)	0.8% on first \$500,000 0.6% on next \$500,000 0.4% on next \$500,000 0.2% on next \$500,000 0.1% on excess value
Nonpermanent (Short-term Investment Pool)	2.0% of grants distributed with \$500 minimum

### NONPROFIT AGENCY FUNDS

**Established by a nonprofit organization for its benefit.**

Endowment (Long-term Investment Pool)	0.3% on first \$500,000 0.2% on next \$500,000 0.1% on excess value
Charitable Savings (Short-term Investment Pool)	2.0% of grants distributed with \$500 minimum

### SCHOLARSHIP FUNDS

**Established to help students achieve educational success.**

<b>Scholarship Endowment Fund</b> The community Foundation distributes applications, manages the screening and selection process, disburses checks annually, and tracks students for multi-year awards.	2.0% on first \$500,000 1.8% on next \$500,000 1.6% on excess value
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### DESIGNATED ENDOWMENT FUNDS

**Established for the benefit of a nonprofit agency.** 1.25%

### FIELD OF INTEREST AND UNRESTRICTED ENDOWMENT FUNDS

**Established by a donor-specific field of interest or unrestricted use.** 1.25%

### CHARITABLE GIFT ANNUITIES

**Established by a donor for a lifetime stream of annual income; upon death, residuum amount benefits a charity.** 1.0%

## Personalized Services

We offer personalized services to simplify managing your private or corporate foundation and enhance your impact. From administrative support to grantmaking expertise, we tailor our services to fit your needs, with fees customized based on the level of support you choose.

### PHILANTHROPIC PLANNING

Values and interests exploration

Invitation to small-group family philanthropy sessions

Access to educational materials on family philanthropy

Philanthropic succession planning

Development and implementation of strategic philanthropic plan

Facilitated family meetings for philanthropic goals and grantmaking

Development of mission and vision statements

Preparation of legacy statements

### MARKETING AND COMMUNICATIONS

Promotion of grant application rounds through Community Foundation newsletters, website, and social media

Customization of templates and communications to include your logo and branding

### GRANTMAKING AND EVALUATION

Call-in due diligence on nonprofit organizations

Access to expert grantmaking staff with nonprofit expertise

Access to CFGFW Impact Fund grantee quarterly reports

Customized grant application web page/portal

Complete grantmaking and evaluation services (which can include below)

Requests for proposals and solicitations

Grantmaking best practices and establishment of customized processes and procedures

Complete proposal review and vetting

Customized site visits

Customized nonprofit financial analysis

Customized grant evaluation services

Use of the online grant and evaluation portal

### GOVERNANCE

Board and committee meeting coordination

Administrative management of files and documents

Administrative management of Board meeting minutes

**For more information, visit [cfgfw.org](https://www.cfgfw.org) or contact Kiley Tate-Potts at 260-969-3113 or [ktatepotts@cfgfw.org](mailto:ktatepotts@cfgfw.org).**