

The Community Foundation offers more than 40 years of experience and expertise in charitable planning.

Our hands-on approach allows us to treat each donor personally, offering thoughtful guidance with the right expertise. We take the time to learn each donor's history, goals and passions to recommend a giving strategy uniquely their own.

The Community Foundation's fees support the administrative requirements of your fund, as well as the customized services we offer. Fees also support further charitable investment in our region including research on civic concerns, leadership collaboration on critical issues and encouraging philanthropy in our community.

We keep our tiered fee schedule low by managing costs. Investment fees are assessed separately from the administrative fee.

ANNUAL FEE STRUCTURE ASSET AMOUNT	RATE
On the first \$1,000,000	1.00%
On the next \$4,000,000	0.85%
On the next \$5,000,000	0.60%
On the next \$10,000,000	0.40%
More than \$20,000,001	0.20%

The minimum amount to establish a fund is \$25,000. This schedule represents an annual cumulative stepped fee on the market value of the Fund, assessed 1/12th monthly.

For more information, please contact us at 817.877.0702.