

Charitable Giving Options

Fund Type	Named Unrestricted Fund	Designated Fund	Field of Interest Fund	Donor Advised Fund	Scholarship Fund	Donor Advised Individually Managed Fund
Involvement and Control	Endowed gift to Community Needs Fund; CF awards grants	Endowed gift to benefit a specific organization (s); CF awards grants	Endowed gift for a specific cause; CF awards grants	Endowed gift, Donor recommends grantmaking; CF awards grants	Endowed gift, Donor comprises no more than 50% of the committee that reviews applications	Endowed gift, Donor recommends grantmaking; CF awards grants; Recommends Investment
Tax status Deductibility	Public Charity	Public Charity	Public Charity	Public Charity	Public Charity	Public Charity
Type of Gifts	Cash, Appreciated Stock, Real Estate, Closely Held Stock, QCD from IRA	Cash, Appreciated Stock, Real Estate, Closely Held Stock, QCD from IRA	Cash, Appreciated Stock, Real Estate, Closely Held Stock, QCD from IRA	Cash, Appreciated Stock, Real Estate, Closely Held Stock, QCD gifts are <u>not</u> allowed by the IRS, Bunching a large gift in one tax year and grant over many years	Cash, Appreciated Stock, Real Estate, Closely Held Stock, QCD from IRA	Cash, Appreciated Stock, Real Estate, Closely Held Stock, QCD gifts are <u>not</u> allowed by the IRS, Bunching a large gift in one tax year and grant over many years.
Grantmaking Support	Professional CF staff utilizes our Grant Committee for input on community needs to recommend grants & verifies nonprofit status	Professional CF staff annually grants to identified nonprofit & verifies nonprofit status	Professional CF staff is available to help identify & assess grants, provide input on community needs & verifies nonprofit status	Professional CF staff is available to help identify & assess grants, provide input on community needs & verifies nonprofit status for grants you recommend	Professional CF staff is available to help identify & assess grants, provide input on community needs & verifies nonprofit status	Professional CF staff is available to help identify & assess grants, provide input on community needs & verifies nonprofit status for grants you recommend
Startup Gift Size	Minimum of \$5,000 endowment	Minimum of \$20,000 endowment	Minimum of \$20,000 endowment	Minimum of \$10,000 with \$5,000 endowed	Minimum of \$100,000 endowed	Minimum of \$250,000 endowed or non-endowed
Admin Service Fee	1%	1%	1.6%	1.6% or less depending on the initial investment	2%	1% or less depending on the initial Investment
Investment Fee	.45%	.45%	.45%	.45%	.45%	You negotiate with your Investment Advisor
Admin Requirements	Donor has no administration requirements. CF handles all reporting	Donor has no administration requirements. CF handles all reporting	Donor has no administration requirements. CF handles all reporting	Donor has no administration requirements. CF handles all reporting	Donor has no administration requirements. CF handles all reporting	Donor has no administration requirements. Investment Advisor required to submit quarterly statements. CF handles all reporting