

TIERED SERVICES FOR FUNDS



	FUND BALANCE*	FEEs	AVAILABLE SERVICES
Basic	<p>Fund established with less than \$25,000</p> <p>No minimum dollar amount required to open</p>	<p>No administrative or investment fees</p>	<ul style="list-style-type: none"> • 24/7 online account access • Help desk with one-day turnaround on inquiries
Enhanced	<p>Established with \$25,000 or more</p>	<p>1% annual administrative fee</p> <p>Minimum annual fee of \$250</p>	<ul style="list-style-type: none"> • 24/7 online account access • Investment options including long-term growth, balanced pool, cash/money market, or outside investment manager • Personal donor engagement officer as your staff liaison and go-to expert • Charitable planning services including mission development, community knowledge and organization research, and general philanthropic advice
Engaged	<p>Fund balance of \$250,000 and higher</p> <p><i>*Fund balances are evaluated annually in consultation with the donor to determine appropriate level of service.</i></p>	<p>1% annual administrative fee on sliding scale</p> <p>0.5% on the portion \$1M-\$5M</p> <p>0.3% on the portion above \$5M</p>	<ul style="list-style-type: none"> • 24/7 online account access • Investment options including long-term growth, balanced pool, cash/money market, or outside investment manager • Personal donor engagement officer as your staff liaison and go-to expert • Strategic charitable planning services including mission and purpose development, family engagement, youth philanthropic education, facilitation of family meetings • Community knowledge and charitable expertise including research on specific organization or broader community issue, status reports on grant making, and a competitive application process

CONTACT US

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