

DESIGNATED FUNDS

Next Steps

To talk further about opening a fund, please contact our Donor Relations Team.

(920) 432-0800

ONGOING SUPPORT FOR CAUSES YOU CARE ABOUT

Designated funds allow you to choose specific charities to receive annual support. The organizations are named by you at the time the fund is established, and each year the named charities will receive a distribution from the fund.

Providing ANNUAL SUPPORT

Designated funds are endowed to provide long-term support for organizations you care about. They can be funded during your lifetime or as part of your estate. When we work with you to establish the contract, you outline your wishes and leave the rest to us. Each year we will send a check, in your fund's name, to each named organization.

Preserving YOUR INTENT

You have the option to provide direction to each organization about how you would like your gifts to be utilized. We work with the named nonprofits to ensure your intentions are being met.

Stewarding YOUR INVESTMENT

The Community Foundation uses a constant growth spending model to determine the annual distribution of our endowed funds. Using this model, each fund's spending grows with the expected rate of inflation. This approach smooths out the peaks and valleys of the market and allows for a higher spending rate in times of poor market performance when need tends to be higher. It also allows for lower spending rates in a strong market so savings can be reinvested in the endowment.

Designated funds can be established with a minimum contribution of \$10,000. Administration fees are 1.0% or \$250 annually.

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