

COMMUNITY IMPACT FUND

Established by a donor to support the changing community. The most flexible of funds, it grows with the community over time, allowing support of a variety of emerging needs and opportunities that come to the forefront for Lancaster County.

BENEFITS

- Donor selects fund name and description at \$10,000 level
- Fund listing on Community Foundation's website
- Secure online giving—currently with no transaction fees (typically 3%) and personalized acknowledgments
- Professional investment management provided by Glenmede (www.glenmede.com)
- Planned giving and donation assistance with complex assets
- Annual fund report and favorable tax treatment

MINIMUM CONTRIBUTION LEVEL

\$10,000

Can be achieved over five years; annual spending amount is reinvested until minimum is achieved.

ACCEPTABLE GIFT TYPES

- **CASH/CHECK**
- **CREDIT CARDS**
(via secure online contributions)
- **PUBLICLY-TRADED AND CLOSELY HELD SECURITIES**
- **BEQUESTS**
liquid assets as well as tangible personal property and real estate
- **RETIREMENT FUNDS**
- **TANGIBLE PERSONAL PROPERTY/REAL ESTATE**
- **LIFE INSURANCE**

FOUNDATION OVERSIGHT FEES*

First \$1 Million	1.50% OF FUND MARKET VALUE
Next \$2 Million	1.30%
Balances Over \$3 Million	1.10%

*Fees are pro-rated and charged monthly

INVESTMENT FEES

APPROXIMATE AVERAGE OF 0.45%;

Investment returns are posted to funds net of investment management fees

ANNUAL SPENDING POLICY

TYPICALLY 3.5% OF

BLENDED MARKET VALUE

based on five-year rolling average of fund's market value

PAYMENT POLICY

ORGANIZATION(S) CAN APPLY THROUGH ANNUAL COMPETITIVE GRANT CYCLE OR ORGANIZATIONS CAN BE IDENTIFIED AND INVITED TO PARTICIPATE.