



FUND OPTIONS FOR INDIVIDUALS

Lancaster County Community Foundation

FUND TYPE	MINIMUM GIFT can be achieved over 5 years; must reach minimum prior to distribution	DONOR INVOLVEMENT	FUND FEATURES	DURATION OF FUND	DISTRIBUTIONS	ANNUAL FEES average of 0.65% investment management fee; returns are posted to funds net of investment fees
DONOR ADVISED FUND permanent	\$15,000	Donor advises Foundation on yearly grants with Foundation board having final approval.	<ul style="list-style-type: none"> • Donor selects fund name and description. • Option for successor advisor to be assigned with additional successor donation. 	perpetual (permanent)	<ul style="list-style-type: none"> • Annual spending amount between 4 and 5% of blended market value of fund-- principal grows in perpetuity • \$100 min grant size 	<ul style="list-style-type: none"> • Investment management fee plus 1.1% of fund balance for Foundation oversight (discounted over \$1m)
non-permanent	\$15,000	Donor advises Foundation on yearly grants with Foundation board having final approval.	<ul style="list-style-type: none"> • as above 	non-permanent	Entire balance available for spending; can be spent down and replenished <ul style="list-style-type: none"> • \$100 min grant size 	<ul style="list-style-type: none"> • as above
DESIGNATED FUND	\$15,000	At time fund is established, donor selects designated charity or charities to receive yearly distribution. These organization(s) will receive an annual distribution in perpetuity.	<ul style="list-style-type: none"> • Donor selects fund name and description. • Provides ongoing, permanent support to one or more charities. • If the beneficiaries should cease to function, the Foundation will redirect income to remain congruent with donor's original charitable purpose. 	perpetual	<ul style="list-style-type: none"> • Annual spending amount between 4 and 5% of blended market value of fund-- principal grows in perpetuity 	<ul style="list-style-type: none"> • Investment management fee plus 1% of fund balance for Foundation oversight (discounted over \$1m)

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FIELD OF INTEREST	\$15,000	Donor selects a broad charitable interest area. Grants made by Foundation Board within area.	<ul style="list-style-type: none"> • Donor selects fund name and description. • Board retains the flexibility to respond to changing opportunities within the designated field of interest. 	perpetual	<ul style="list-style-type: none"> • Annual spending amount between 4 and 5% of blended market value of fund-- principal grows in perpetuity 	<ul style="list-style-type: none"> • Investment management fee plus 1.75% of fund balance for Foundation oversight (discounted over \$1m)
COMMUNITY IMPACT FUND	\$10,000 required for named fund	Grants made by Foundation Board to address important emergent community needs.	<ul style="list-style-type: none"> • Donor selects fund name at \$10,000 level. • Any amount accepted for (unnamed) general community impact fund. • Allows maximum flexibility to address community needs. 	perpetual	<ul style="list-style-type: none"> • Annual spending amount between 4 and 5% of blended market value of fund-- principal grows in perpetuity 	<ul style="list-style-type: none"> • Investment management fee plus 1.5% of fund balance for Foundation oversight (discounted over \$1m)
SCHOLARSHIP	\$15,000	Donor may utilize Foundation's standard process or create a custom process and assemble selection committee.	<ul style="list-style-type: none"> • Donor selects fund name and description. • Scholarship winners are eligible to receive matching funds from PHEAA's PATH program. 	perpetual	<ul style="list-style-type: none"> • Annual spending amount between 4 and 5% of blended market value of fund-- principal grows in perpetuity 	<ul style="list-style-type: none"> • Investment management fee plus 2% of fund balance for Foundation oversight (discounted over \$1m)