# ORGANIZE YOUR CHARITABLE GIVING

## Simple steps to establish a fund:

- 1. Name your fund.
- 2. Provide your contact information.
- 3. Choose a fund type and class.
- 4. Choose a method of investment.
- 5. Contribute to your fund.
- 6. Start using your fund to make grants.

#### **Types of Funds**

Donor Advised

Stay involved and support any 501(c)(3) charitable organization.

Field of Interest

Support specific areas such as education, health care, the arts, or other special interest and geographic regions.

Designated

Support one or more specific charitable organizations.

Unrestricted

Support broad charitable needs of the community.

Scholarship

Help students pursue their dreams.

#### Class of Funds

Non-endowed: Give for today. Endowed: A permanent fund that keeps giving.

### DONATE

TO YOUR FUND AND RECEIVE A TAX DEDUCTION



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GRANT

TO 501(C)(3) PUBLIC CHARITIES AT YOUR CONVENIENCE

#### **Administrative Fees**

Minimum \$250 fee per year

Fund Size	Non Endowed	Endowed
\$0 - \$1 million	2.0%	1.5%
\$1,000,001 to \$4,999,999	1.0%	1.0%
\$5 million and above	0.5%	0.5%

Sample Annual Fee Illustration

Fund Size	Non Endowed	Endowed
\$1,000	\$250	\$250
\$500,000	\$10,000	\$7,500
\$1,000,000	\$20,000	\$15,000

What do fees support?

Administrative fees support Kern Community Foundation's strategic initiatives: College Access and Nonprofit Strengthening.