



DONOR SERVICES FEE STRUCTURE

The Community Foundation of Northern Colorado relies in part on fund service fees to expand our regional and community impact work and provide the highest-quality philanthropic services.

I Want To...	Fund Type	Fund Service Fees	Minimum Initial Balance
Recommend grants for charitable purposes and have the Community Foundation distribute the grants.	Donor Advised Fund	<ul style="list-style-type: none"> Up to \$250,000: 1.5% Next \$250,000: 1.0% Next \$500,000: 0.5% More than \$1 million: 0.45%* <i>Minimum annual fee of \$375</i>	\$25,000
Establish a fund for our nonprofit agency to provide sustainable revenue for our mission.	Nonprofit Agency Fund	<ul style="list-style-type: none"> Up to \$250,000: 1.5% Next \$250,000: 1.0% Next \$500,000: 0.5% More than \$1 million: 0.45%* <i>Minimum annual fee of \$250</i>	\$10,000
Choose specific charitable organizations and have the Community Foundation distribute the grants over a designated timeframe or in perpetuity.	Designated Fund	<ul style="list-style-type: none"> Up to \$250,000: 2% Next \$250,000: 1.5% Next \$500,000: 1.0% More than \$1 million: 0.75%* <i>Minimum annual fee of \$250</i>	\$10,000
Choose an area of interest (e.g. environment, education, etc.) and allow the Community Foundation to identify grantees and award grants.	Field of Interest Fund	<ul style="list-style-type: none"> Up to \$250,000: 2.5% Next \$250,000: 2.5% Next \$500,000: 2.0% More than \$1 million: 1.0%* <i>Minimum annual fee of \$375</i>	\$25,000
Choose criteria for scholarships and have the Community Foundation coordinate the selection process and distribute the grants for individual recipients.	Customized Scholarship**	<ul style="list-style-type: none"> Up to \$250,000: 2.0% Next \$250,000: 2.0% Next \$500,000: 1.0% More than \$1 million: 0.5%* <i>Minimum annual fee of \$5,000</i>	\$200,000
Participate with others to combine gifts and recommend grants for charitable purposes.	Committee Advised or Giving Group	<ul style="list-style-type: none"> Up to \$250,000: 2.0% Next \$250,000: 2.0% Next \$500,000: 1.0% More than \$1 million: 0.5%* <i>Minimum annual fee of \$375</i>	\$25,000
Donate my assets to a trust and choose how I or my beneficiaries can receive regular income from the trust.	Charitable Remainder Trust	<ul style="list-style-type: none"> Up to \$250,000: 2.0% Next \$250,000: 1.5% Next \$500,000: 1.0% More than \$1 million: 0.75%* <i>No minimum annual fee</i>	\$250,000
Support the Foundation's work in addressing key community issues and planning for the future wellbeing of Northern Colorado.	Community Champions Fund	No service fees	No minimum

Additional fees may be charged for enhanced services or other philanthropic advisory services requested and rendered on behalf of a fund.

*For funds with balances greater than \$1 million, fees decrease by 0.05% for every additional \$1 million until reaching minimum fee of 0.35%.

**Additional opportunities to support scholarship programs with lower minimum initial balances are available.

Revised 09.19.22