

Field of Interest Fund

Urban green spaces? Music lessons in public schools? Alleviating hunger? Whatever your passion, you can entrust your concerns and your joys to the Greater Washington Community Foundation with a field of interest fund.

Through a field of interest fund, you can identify and support a broad or specific charitable purpose, issue, or geographic area. Our staff identifies organizations with proven impact and makes grants to the nonprofits that best fit your interests.

The Community Foundation offers several options for addressing your interests through a field of interest fund:

- **CO-INVEST** with other donors in an existing field of interest fund. Your gift of any size will increase the total amount available for grants.
- **CREATE YOUR OWN** named field of interest fund. Following your statement of purpose, The Community Foundation will identify organizations with proven impact and distribute grants to the nonprofits that best fit your interests.
- **ENDOW** your field of interest fund to provide perpetual support in the area you name, even as needs and conditions evolve over time.

JOIN US

By establishing a fund at The Community Foundation, you become part of a philanthropic community with access to convenings, nonprofit site visits, the latest research and publications, opportunities for collective giving, and other ways to transform the communities we love.

GIFTS TO YOUR FUND

You can establish a field of interest fund with a minimum initial contribution of \$10,000, and add to your fund at any time. Your contributions qualify for the maximum charitable tax deduction. The Community Foundation accepts contributions of:

- **LIQUID ASSETS:** cash, credit card, or publicly traded securities.
- **COMPLEX ASSETS:** closely held stocks, bonds, mutual funds, real estate, or other real assets.
- **LEGACY GIFTS** through a bequest in a will or trust, beneficiary designation for retirement assets (IRA, 401K, 403B) or life insurance policies, or charitable remainder trust.
- **IRA CHARITABLE ROLLOVER** gifts from your retirement fund, if you are age 70.5 or older.

INVESTMENT OPTIONS

We will work with you to determine how your fund should be invested. The Community Foundation has partnered with SEI to manage our portfolio of investments. SEI has demonstrated a commitment to a triple bottom-line impact: profit, people, and planet. SEI's track record of continued growth, diverse portfolio managers, and outstanding suite of services offer many benefits to our donors, your charitable funds, and our community, now and for decades to come.

COMMUNITY FOUNDATION SUPPORT FEES

The Community Foundation relies on fees assessed on component funds which enable us to provide you with high-quality administrative and philanthropic advisory services and help expand our work to build thriving communities in the Greater Washington region. Fees are assessed quarterly based on fund balance, with a minimum annual fee of \$750.

Endowed funds	Balance up to \$1 million	Balance from \$1-\$3 million	Balance from \$3-\$5 million	Balance above \$5 million
	1.1%	0.8%	0.6%	0.35%
Non-endowed funds	Balance up to \$1 million	Balance from \$1-\$2.5 million	Balance above \$2.5 million	
	1.5%	1.25%	0.5%	

Additional fees may be charged for funds with high levels of activity or other enhanced services requested. These fees will be assessed annually based on fund activity.

SPRING CREEK ENVIRONMENTAL & PRESERVATION FUND

The donors who established the Spring Creek Fund cared deeply about the environment but had reached an age where they no longer wanted to actively manage their family foundation. That's when they turned to The Community Foundation.

Terminating the foundation into a field of interest fund at The Community Foundation was a simple process and the donors were glad to be able to maintain anonymity. Most important, they know that The Community Foundation will continue the work that they had begun to preserve, protect, and encourage sustainable use of exceptional natural or built environments in the Greater Washington region, particularly those environments affecting low-income populations.

