
Our job is to help our donors find the most rewarding and effective ways to give back. We offer deep community knowledge, expertise, and insight to connect caring people with causes that matter. With a bird's eye view of the region's nonprofit sector, we understand the greatest needs facing our communities and the organizations that can best serve them. Using field of interest funds, we distribute grants in the areas our donors have identified as priorities.

The Community Foundation offers several options for addressing your particular concerns 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. Or make a gift to endowment and increase giving in this area for generations to come. Contact us for more information about current field of interest funds for co-investment.

- **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 will become part of a philanthropic community with access to community convenings, nonprofit site visits, the latest research and publications, donor connections, opportunities for collective giving, and other ways to transform the communities we love.

**CHOOSING ENDOWMENT**

You may choose to make your field of interest fund a permanent endowment, ensuring that your charitable purpose will be carried out year after year, in perpetuity. Your gift is invested for long-term capital growth and a spending rate determines the amount to be distributed annually, ensuring the stability of your field of interest fund.

**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.
FIELD OF INTEREST FUND, CONTINUED

<table>
<thead>
<tr>
<th>Endowed funds</th>
<th>Balance up to $1 million</th>
<th>Balance from $1+ million - $3 million</th>
<th>Balance from $3+ million - $5 million</th>
<th>Balance above $5 million</th>
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<td>1.1%</td>
<td>0.8%</td>
<td>0.6%</td>
<td>0.35%</td>
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<thead>
<tr>
<th>Non-endowed funds</th>
<th>Balance up to $1 million</th>
<th>Balance from $1+ million - $2.5 million</th>
<th>Balance above $2.5 million</th>
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<tr>
<td>1.5%</td>
<td>1.25%</td>
<td>0.5%</td>
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GIFTS

Your named field of interest fund may be established with a minimum initial contribution of $10,000. You may add to your fund at any time. The Community Foundation accepts contributions of cash and appreciated assets and can facilitate even the most complex forms of giving. Your contributions qualify for the maximum charitable tax deduction.

• **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. Please visit thecommunityfoundation.org/investment-options to read more about the available offerings.

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. Their track record of continued growth, diverse portfolio managers, and outstanding suite of services offers many benefits to our donors, your charitable funds, and our community, now and for decades to come.

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: preserving, protecting, or encouraging sustainable use of exceptional natural or built environments in the Greater Washington region, particularly those environments affecting low-income populations.