Fees & Spending Policy
Donor Advised Fund

	Non-Endowed & Invested	Endowed & Invested	Non-Endowed & Non-Invested
Annual Fee	• 1.25% for <$1,000,001 • 0.75% for $1,000,001 to $1,500,000 • 0.50% for $1,500,001 to $2,000,000 • 0.25% for $2,000,001+	• 1.25% for <$1,000,001 • 0.75% for $1,000,001 to $1,500,000 • 0.50% for $1,500,001 to $2,000,000 • 0.25% for $2,000,001+	1.5% of each gift to the fund
Investment Fee	Variable	Variable	None
Quarterly Support Fee	$50	$50	None
Spending Policy	Allocations permitted up to the current value of the fund Example: $100,000 fund = $100,000 allocation	Allocations follow Foundation's spending policy* (Currently 4%) Example: $100,000 fund = $4,000 allocation	Allocations permitted up to the current value of the fund Example: $100,000 fund = $100,000 allocation

*The allowable spending amount is calculated using the approved distribution percentage approved annually by the Foundation's Board of Trustees. It is based on a rolling 20-quarter average balance. Call for amount.

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Frequently Asked Questions
Donor Advised Funds

What types of assets can be used to establish a Donor Advised Fund?
A Donor Advised Fund can be established with a wide range of assets, including:
- cash
- appreciated stocks
- bonds
- mutual funds
- life insurance
- real estate
- charitable trusts
- retirement assets
- bequests

The Foundation works with donors and their professional advisors to structure tax efficient giving.

Can a Donor Advised Fund be created through an estate?
Yes. A Donor Advised Fund can be created through an estate plan, allowing charitable giving to continue for generations. The Foundation recommends documenting the fund in advance and including it with estate planning materials to clearly reflect donor intent.

Can IRA assets be contributed to a Donor Advised Fund?
Current federal regulations do not allow direct IRA contributions to Donor Advised Funds. However, other options, such as Designated Funds or Field of Interest funds, may be established through the Foundation.

How can professional advisors be involved?
Professional advisors are valued partners in our work. The Foundation collaborates with:
- financial advisors
- attorneys
- wealth managers
- accountants

to help donors achieve their charitable goals.

Which organizations can receive grants?
Donors may recommend grants to IRS-qualified public charities anywhere in the US, including nonprofits, schools, and faith-based organizations. Many organizations serving internationally also maintain US-based charitable entities eligible to receive grants.

Have additional questions?
Our team is always available to provide guidance and support.

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Your Giving Simplified.
Your Impact Amplified.

Why set up your Donor Advised Fund at Central Carolina Community Foundation?

Personalized Service

You work directly with experienced professionals right here in your local community who understand charitable planning and respond personally to your inquiries.

Local Expertise Strengthens Impact

We know the Midlands. Our team meets regularly with nonprofits and community leaders across our 11-county region, helping you make informed, strategic grant decisions.

Connection to Community

We offer opportunities to learn, collaborate, and engage with other donors who care about the same issues and communities you do.

Your Fees Doing Good Locally

Your fees are reinvested in the Midlands — strengthening nonprofits in our region.

...and you still get the same benefits as other Donor Advised Fund providers

- Immediate tax deduction
- One consolidated tax receipt
- Ability to recommend grants nationwide
- Optional anonymity for grants
- Easy access to your account via web or mobile
- Data are safe and secure

Why It Matters

At Central Carolina Community Foundation, your Donor Advised Fund is more than a charitable account — it is a partnership rooted in place and purpose, ensuring your giving is guided by expertise, aligned with your values, and invested in lasting local impact.

Establish a Donor Advised Fund
at Central Carolina Community Foundation

Opening a Donor Advised Fund at Central Carolina Community Foundation allows you to turn your values into lasting impact. Whether you are an individual, family, or business, a Donor Advised Fund offers a simple and flexible way to manage and grow your charitable giving.

How Does It Work?

Give.
You contribute to your fund and receive a single tax receipt.

Grow.
Your charitable assets are invested for long-term growth.

Grant.
When you are ready, you recommend grants to qualified nonprofits—locally or nationwide.

Why Partner With Central Carolina Community Foundation?

Your priorities. Your community. Your foundation.

Strategic & Streamlined
We handle administration, due diligence, and compliance, so you can focus on impact.

Flexible & Responsive
Recommend grants on your timeline, aligned with your priorities.

Rooted in the Midlands
Since 1984, we have connected and mobilized people and resources to strengthen our 11-county region.

Designed Around Your Goals
Structure your fund for immediate community investment or long-term legacy.

Getting Started

Opening a fund is simple. Choose a name, make an initial contribution of $10,000 or more, decide whether your fund will be endowed or non-endowed, and sign a brief agreement. Recommend grants at your convenience. Contribute to your fund anytime. We are here to guide you through each step and help align your giving with what matters most to you.

Central Carolina Community Foundation retains final discretion over all grants as required by IRS regulations. Contributions are irrevocable and used solely for charitable purposes. Please consult your legal or tax advisor regarding your specific situation.

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