

Support Fees

The Sacramento Region Community Foundation offers a variety of philanthropic funds to help donors achieve a wide range of charitable goals. Support fees help to cover our operations. Importantly, they are also reinvested in the community through grantmaking and programs — attending to critical regional issues, improving local lives, and multiplying the impact of our fundholders' giving. **Our shared commitment to the region is what sets us apart from other institutions.**

Fees depend on the type and size of fund. For most fund types, a minimum support fee of \$250 will be applied. Often, fee rates are annual and paid directly from the fund balance on a monthly basis. We maintain a tiered support fee structure for gifts over \$1 million; if the balance of the fund changes over time, the support fee percentage will be adjusted, if applicable. *For instance, on the first \$1 million of an expendable Donor Advised Fund, the Foundation assesses a 2% support fee. On the next \$1 million, the Foundation charges 1.75%, and so on.*

Donor Advised, Designated, Business, Giving Circle, and Unrestricted Funds

Minimum Support Fee: \$250 • Minimum initial gift: \$10,000 • Minimum to endow: \$50,000 • Minimum balance: \$500

<i>Competitive grantmaking includes an extra .5% support fee.</i>	Expendable	Endowed
Up to \$1,000,000	2.00%	1.50%
Next \$1,000,001 to \$5,000,000	1.75%	1.25%
Next \$5,000,001 to \$10,000,000	1.50%	1.00%
Next \$10,000,000+	1.25%	0.75%

Nonprofit Funds

Minimum initial gift: \$10,000 • Minimum to endow: \$50,000 • Minimum balance: \$500

	Expendable	Endowed
Up to \$1,000,000	1.00%	1.00%
Next \$1,000,001 to \$5,000,000	0.875%	0.875%
Next \$5,000,001 to \$10,000,000	0.75%	0.75%
Next \$10,000,000+	0.50%	0.50%

Field of Interest Funds

Minimum Support Fee: \$250 • Minimum initial gift: \$10,000 • Minimum to endow: \$50,000 • Minimum balance: \$500

<i>Fees assessed are based on grantmaking approach, regardless of fund balance</i>	Expendable	Endowed
Grantmaking is Foundation-directed	2.00%	1.50%
Grantmaking is competitive with Outside Review Committee	2.50%	2.00%
Grantmaking is competitive and Foundation-led	3.00%	2.50%

Scholarship Funds

Minimum Support Fee: \$500 • Minimum initial gift: \$25,000 • Minimum to endow: \$50,000 • Minimum balance: \$500

<i>Fees assessed do not differ based on fund balance</i>	Expendable	Endowed
All sizes	3.50%	2.50%

Services covered by fees include fund establishment, gift acknowledgement, investment management, grants administration, and individualized services, such as research on nonprofits and special requests. Other direct costs (such as appraisal or legal fees) attributable to the activities of a fund are passed directly to the fund. Stated fees decrease as balances grow and can vary depending on services requested. Under special circumstances, expendable fund fees may be assessed on gift activity or grant activity. The Board may review and adjust these fees at its discretion, no more than once per year, with 45 days' notice to fundholders.



**SACRAMENTO REGION
COMMUNITY
FOUNDATION**
INSPIRING PHILANTHROPY