



TYPES OF FUNDS

Many ways to give, tailored just for you.

AGENCY FUND

Established by a nonprofit organization, an Agency Fund helps the organization build long term assets and serves as a home for reserve funds. The fund is pooled and professionally invested with other foundation funds. Agency funds can be endowed, providing long-term sustainability and an annual stream of income, or non-endowed to provide the agency full access to the funds.

DESIGNATED FUND

Endowed fund established by donors who want to provide ongoing annual support to one or more specific charitable organization(s). The donor selects their charity(ies) to receive an annual contribution based on an annual spending rate. Designated funds provide perpetual support and help build a sustainable income for a variety of charitable causes.

DONOR ADVISED FUND

A Donor Advised Fund is like a having your own foundation, allowing you to recommend grants, at any time, to 501c3 public charities, schools, or churches. You or a designee make grant recommendations to your favorite charities and/or to respond to needs in the community. This is the most flexible type of fund for active giving.

CHARITABLE REMAINDER TRUST (CRUT)

A Charitable Remainder Unitrust (CRUT) is an irrevocable trust that generates a stream of income for one or more named beneficiaries, or a term of years, to receive the income benefits. After the beneficiary's lifetime or term, the remainder is used to establish a permanent fund that provides an annual grant to charities of your choice.

FIELD OF INTEREST FUND

A Field of Interest Fund allows you to support the many organizations that are working to improve and enhance a particular area of interest, such as the arts or environmental causes, but leaves the selection of the grant recipients to the foundation. This can be used as an annual competitive grant program, or general support for the area as needs arise.

SCHOLARSHIP FUND

Establishing a Scholarship Fund may be one of the most rewarding giving experiences. Whether you want to support students in a specific area, attending your alma mater, or in great financial need – starting a scholarship fund gives you an opportunity to significantly and directly impact someone's life.

