

SERVICE FEE SCHEDULE

In an effort to simplify our donor experience, the Community Foundation for Southwest Washington consolidates the cost of its donor services and investment management into a single fee. This structure offers a direct valuation of your benefits as a charitable fundholder. See below for more specific information regarding our fee structure for Donor Advised and Scholarship Funds.

Donor Advised Fund Service Fees

The Community Foundation assesses a sliding-scale service fee on all Donor Advised Funds. This fee helps defray the administrative costs of managing your fund and providing top-tier donor services.

Fund Balance Fee Rate

For the first \$100,000	1.75%
For the next \$400,000.....	1.30%
For the next \$500,000.....	1.20%
For the next \$1 Million	1.10%
For the next \$3 Million	0.85%
For the next \$15 Million	0.55%
More than \$20 Million	0.35%



Scholarship Fund Service Fees

The Community Foundation assesses a 2% service fee to cover the costs associated with managing a Scholarship Fund, which includes coordinating selection committees, providing professional advice and offering other donor services (minimum fee is \$250 per year).



**COMMUNITY
FOUNDATION**
**SOUTHWEST
WASHINGTON**

610 Esther Street, Suite 201, Vancouver, WA 98660
www.cfsww.org | Phone: 360.694.2550 | Fax: 360.737.6335