



Charitable Gift Fund - Current

- Minimum amount to Establish - \$25,000
- No minimum for additional gifts
- Minimum Balance - \$1,000
- Must have activity at least once every 5 years
- Fee: 1% (.25% quarterly) with minimum of \$300 (\$75 quarterly)

Grants

- Minimum Grant Amount: \$500
- Grants Distributed Quarterly - requests must be received by the 15th of the last month of the quarter
- Auto-recurring gifts may be established
- Receiving organizations must be a United State based 501(c)3 organization

Testamentary Charitable Gift Funds

Pass-Thru Estate Gifts

- No minimum dollar amount
- Fee: 0.5%

Limited-Term Estate Gifts

- Minimum Amount: \$25,000
- Timeframe: Up to 15 years
- Fee: 1% annually

*A combination of Pass-Thru and Limited-Term may be utilized to create your unique charitable impact strategy

Reporting: No online reporting access will be available to the donor. Reports will be provided to the donor/representative quarterly either electronically or by paper depending on donor preference.