

SIGNATURE FUNDS

With a signature fund at the Austin Community Foundation, you enjoy the customization and control of having your own charitable foundation without the burden of the costs and legal requirements of one. When you partner with us by establishing your signature fund, you benefit from our expert staff and personalized service to realize your philanthropic goals.

Benefits and Services

- Ease of minimum administrative requirements and no tax forms or audits (compared with family foundation)
- Include “Foundation” in your fund name
- Customized stationery bearing your signature fund name for grant transmittal and other communication
- Invitation to monthly Austin Area Funders meetings and other exclusive events
- Our highly experienced investment counsel, committee of professionals, and staff oversee investment activity. Our large investment portfolio reduces costs and our investment strategy is diversified to preserve your charitable dollars long term.
- Immediate charitable deduction for your gift (amount allowable by law)
- Ability to consolidate all your charitable giving
- Invested funds may be permanent (endowed) or 100% available (quasi-endowed)
- Give locally, to any nonprofit in the U.S. and abroad (some limitations apply to international grants)
- Make grants online any time
- Customized services (refer to reverse side)

A signature fund may be opened with a gift of cash, appreciated stock, mutual fund shares, closely held stock, real estate, retirement account, life insurance, bequest, or other deferred gift.

Signature Fund Tiered Fees

	Assets
Fund Fee	\$1,000,000 – 1.0% of Assets \$1,000,000+ - 0.75% \$3,000,000+ - 0.50% Fees are assessed at the rate of 1/12th of the fee on the average market value of fund each month.
Additional Fees	Annual fee \$1,000-\$5,000 depending on services provided.
Fund Minimum	\$1,000,000

Investment expenses average 0.3 - 0.8% depending on investment strategy and include the fee of our investment counsel.

Additional fees apply for gifts made with credit card.

The spending policy for endowed funds provides for a maximum available for granting and is calculated as 4% of the average trailing 20 quarters of the fund's market value.

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Menu of Charitable Services

Type	Service
Comprehensive Philanthropic Services	<ul style="list-style-type: none">• Customized philanthropic advising with our expert staff*• Access to in-depth local knowledge through our staff and network of community leaders• Guidance in defining your philanthropic strategy and annual fund review to assess effectiveness of giving*
Investment Services	<ul style="list-style-type: none">• Separately managed or choose from the Foundation's investment options• Our highly experienced investment counsel, committee of professionals, and staff oversee investment activity• Our large investment portfolio reduces costs and our investment strategy is diversified to preserve your charitable dollars for long term.
Grantmaking Services	<ul style="list-style-type: none">• Facilitate granting of complex assets to nonprofits• We can help define strategy, engage family members and assess the effectiveness of grantees.*• Ability to review and fund requests made through Foundation's Community Grants program, providing a broader opportunity to learn about community needs• Facilitate and administer committee or advisory board*• Vet and evaluate organizations and project proposals through custom grant applications*• Provide anonymous granting and field inquires from nonprofits on your behalf
Administrative Services	<ul style="list-style-type: none">• Immediate charitable deduction for your gift (amount allowable by law)• Ability to consolidate all your charitable giving• Cost effective administrative oversight including IRS-mandated tax returns and annual audits• View fund activity online at anytime• Full back-office services (all gift and grant processing, financial statements, etc.)• Customized stationary bearing your Fund name• Plan, facilitate and document advisory board meetings*• Monthly financial statement, quarterly fund statement and annual fund review with Foundation team• A fund may be opened with a gift of cash, appreciated stock, mutual fund shares, closely held stock, real estate, retirement account, life insurance, bequest, or other deferred gift.• Support converting private foundation

For more information: Cybil Guess, Vice President Donor Relations
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*Additional fees may apply depending on scope of services