Peninsula Community Foundation of VIRGINIA

Fund Options, Fees and Minimums

Helping you give with ease, purpose and flexibility.

Donor Advised Funds

Endowed

- Minimum to establish: $25,000
- Tiered Fee

Non-Endowed

- Minimum to establish: $5,000
- Tiered Fee

A minimum fund balance of $10,000 is required before grant recommendations can be processed.

Targeted Giving

Designated & Field of Interest

(Endowed)

- Minimum to establish: $25,000
- Tiered Fee

(Non-Endowed)

- Minimum to establish: $10,000
- Tiered Fee

Scholarship Funds

Endowed

- Minimum to establish: $25,000
- Tiered Fee

Non-Endowed

- Minimum to establish: $25,000
- Tiered Fee

2% fee for all scholarship funds where PCF handles application processing.

Agency Funds
(Non-profit)

Endowed

- Minimum to establish: $25,000
- Fee: 0.65%

Non-Endowed

- Minimum to establish: $10,000
- Fee: 0.65%

Tiered Fee Structures

Endowed

0.75% on first $1mm in Fund assets plus,
0.55% on Fund assets between $1mm and $5mm plus,
0.35% on Fund assets over $5mm.

Non-Endowed

1.00% on first $1mm in Fund assets plus,
0.55% on Fund assets between $1mm and $5mm plus,
0.35% on Fund assets over $5mm.

Important Information

- All funds are subject to a $5,000 minimum balance.
- Direct fund expenses will be charged to the Fund balance (ie. wire fees).
- All funds are subject to investment management fees charged by our investment managers.
- Administration, Investment and Grant Management fees may be adjusted from time to time with approval of the Foundation's Board of Directors.
- In special circumstances fees, charges and minimum balances may be adjusted upon approval of the CEO and consent of the Chairman of the Board in the initial year of the fund.