



**FORT ATKINSON**  
COMMUNITY FOUNDATION

## Administrative Fees

Our administrative fees support the mission of the Community Foundation. They help to cover staff time and other expenses incurred in the processing of gifts; the offering, awarding and processing of scholarships; reviewing and awarding grants; preparation of annual independent audits; opening and managing charitable funds; publication of an annual report; oversight of investment performance; donor relations; nonprofit trainings; community convenings; and the promotion of charitable giving that ultimately transforms the community we call home. Board members serve without compensation.

There is no fee to open a fund.

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### Endowed Funds (invested)

- **Designated Fund** .6% on the first \$500,000  
.2% on the remainder
- **Donor-Advised Fund** .6% on the first \$500,000  
.2% on the remainder
- **Field of Interest Fund** .6% on the first \$500,000  
.2% on the remainder
- **Scholarship Fund** 1% on the first \$500,000  
.5% on the remainder

### Non-Endowed (not invested)

- **Designated Project Fund** 1% on donations
  - **Scholarship Fund** 2% on donations
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### Acorn Fund

No administrative fees are assessed until the fund balance reaches the minimum endowment level of \$15,000.