

An Array of Fund Options to Help You Meet Your Philanthropic Goals and the Community's Needs

***Key: Advised funds:** Donors may have access to the income and principal of the fund, so long as they maintain the minimum fund balance. **Endowed funds:** Annually use the Foundation's spending policy, currently 4.25%.

Type of Fund	Minimum Fund Balance	Fund Fee (annual)	Perfect for Donors Who Want to...	Advisor	*
Donor-Advised Fund	\$10,000	1.25%	<ul style="list-style-type: none"> Actively engage in grantmaking Enjoy flexibility in the timing and size of gifts given and grants awarded. Involve their family in giving 	Donor or anyone else they appoint as an advisor recommends grants for nonprofit organizations at any time.	Advised
Scholarship Fund	\$25,000	1.5%	<ul style="list-style-type: none"> Help students afford a college education 	Donor defines scholarship criteria upon establishing the fund, and the Foundation awards scholarships from the fund to students meeting the donor's criteria.	Endowed
Designated Fund	\$10,000	1%	<ul style="list-style-type: none"> Support a specific nonprofit organization 	Donor indicates the nonprofit beneficiary upon establishing the fund.	Endowed
Community Grantmaking Funds	\$10,000	1.25%	<ul style="list-style-type: none"> Address the issues or causes they care about, such as education or the arts 	Donor names an interest/cause upon establishing the fund. The Foundation distributes money from the fund to nonprofits within that area of interest.	Endowed
Unrestricted	\$10,000	None	<ul style="list-style-type: none"> Provide the most flexible support in order to respond to timely community needs 	Donors place no restrictions on their fund, allowing the Foundation to award grants annually to meet the most pressing and changing needs of the Pioneer Valley area.	Endowed