

FIELD OF INTEREST FUNDS

Following a Passion



By creating a Field of Interest Fund, donors can choose to support a specific area of concern, and let the Foundation determine which organizations are doing the best work in that area through a competitive grant making process. The Foundation will make grants on your behalf to the most appropriate and effective organizations. A Field of Interest Fund allows you to focus your giving on an area that is meaningful to you, whether it is the welfare of children, the vibrancy of our local arts scene, or the prevention of homelessness, to name a few.

GETTING STARTED IS EASY.

Field of Interest Funds offer you the opportunity to support evolving needs and a variety of nonprofits focused on your broad area of interest. This type of fund allows donors to work closely with the Foundation's grant making team to identify organizations that are having the greatest impact in the area of your choice. You can open your Field of Interest Fund with a minimum contribution of \$10,000 and qualify for an immediate income tax deduction.

IMMEDIATE IMPACT OR ENDURING IMPACT

You can choose to open an *expendable* Field of Interest Fund, allowing you to decide when and how much to give to the organizations you have chosen as long as there is a minimum balance in the account. You can also create an *endowed* Field of Interest Fund, meaning that the funds are invested in perpetuity and a portion of the balance can be granted out each year to your designated organizations – forever.

CONSIDER A FIELD OF INTEREST FUND IF YOU:

- Have a specific area of interest you would like to support.
- Want to learn more about other nonprofit organizations in our community offering programs and initiatives in your chosen field of interest.
- Believe in the research and community evaluation processes of the Foundation to determine needs and effectiveness of nonprofit programs.

KEY BENEFITS

Field of Interest Funds are an ideal choice if you want to impact a specific philanthropic interest area, such as the arts, education, or the environment, and know that your support is going to the most effective organizations working in that area. Key benefits include:

EASY

Work with our experienced staff to create your own unique fund, and have access to valuable knowledge about area nonprofit organizations by using our online resources at www.sacregcf.org. We make supporting your philanthropic passions easy.

FLEXIBLE

Add to your fund anytime, and have easy online access to your gift and grant history. Our staff can work closely with your financial advisor to help facilitate gifts of many types of assets, including stock and real property.

PERSONAL

Your fund is just that, your fund. It reflects the causes and organizations you care about—in this region and beyond. We're here to offer individualized service and strategies to help you carry out your goals and suggest ways to increase your impact through exclusive donor communications, learning sessions and special events.

EFFICIENT

The Foundation staff handles all the administrative tasks of achieving your philanthropic goals – from investment options and quarterly statements to advising you on charitable giving – all for a nominal administrative fee to support our work on behalf of the community. The annual fees are 2% for *expendable* funds and 1.5% for *endowed* funds.

WE'RE HERE TO HELP YOU!

Learn more about the Foundation and Donor Advised Funds by emailing info@lodicf.org or by calling (209) 910-3523.