

DESIGNATED FUND

Drive Continuous Support

A Designated Fund supports one or more nonprofit organizations, providing lasting impact for the charitable causes you care about.



Why Choose a Designated Fund?

DEFINED You specify exactly which non-profit(s) your fund will support.

LASTING Direct funding to a charity for years to come.

STREAMLINED The Lodi Community Foundation manages your fund's full-service administration, letting you focus on your philanthropic goals.

GROWING Designated Funds grow over time through investment, multiplying the impact of your original contribution.



Community Investment Contribution “Fees”*

NON-ENDOWED (Flexible & fully spendable)

- 2.00% or \$200 annual fee minimum

ENDOWED (Here forever)

- 1.00% or \$200 annual fee minimum

*Helps us manage funds responsibly, provide grantmaking support and full-service fund administration, and build the long-term capacity of our community. This covers less than half of LCF's annual operating expenses.

Key Features

FUND MINIMUM

The minimum contribution to establish a Designated Fund is \$10,000 for a non-endowed fund, and \$25,000 for an endowed fund. There is no fee to establish a fund.

TAX DEDUCTION

You are eligible for an immediate tax deduction in the year you donate to your fund.

ASSET TYPES

A variety of assets can be used to create Designated Funds at the Lodi Community Foundation, including:

- Cash
- Stock
- Retirement Accounts
- Other assets approved by our board

RESTRICTIONS

Grants must follow IRS rules and cannot support political activities, personal benefits, or non-charitable purposes.



Ready to Set Up a Fund?

We are here to help you find causes you are passionate about aiding. Reach out to us to establish your Designated Fund and begin making a lasting difference for the causes you care about in our community!

Purpose

Establish a fund that is dedicated to supporting your chosen charities!



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