

FIELD OF INTEREST FUND

Give with Purpose

A Field of Interest Fund supports a donor's chosen area of interest, with the Lodi Community Foundation directing grants to aligned organizations or projects.



Why Choose a Field of Interest Fund?

FOCUSED Define the focus areas that matter most to you and let our team direct and administer your grantmaking fund.

FLEXIBLE Support multiple organizations through a single Field of Interest Fund.

STREAMLINED The Lodi Community Foundation handles the full-service administration of your fund, so you can focus on meeting your philanthropic goals.

GROWING Field of Interest 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 Field of Interest 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 Field of Interest 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 Field of Interest Fund and begin making a lasting difference for the causes you care about in our community!

Direction

A Field of Interest Fund directs your support to a specific area of need!



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