

SCHOLARSHIP FUND

Enable Educational Pursuit

Scholarship Funds expand access to education by providing financial support to students based on your recommended eligibility criteria.



Why Choose a Scholarship Fund?

TAILORED Create funds that memorialize loved ones or focus on a specific subject matter, including academic, athletic and artistic achievement.

FOSTERING Provide young scholars with access to opportunities and pathways to success.

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

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



Community Investment Contribution "Fees"*

NON-ENDOWED (Flexible & fully spendable)

- 5.00% or \$750 annual fee minimum
- \$250 set-up fee

ENDOWED (Here forever)

- 3.00% or \$750 annual fee minimum
- \$250 set-up fee

*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 Scholarship Fund is \$25,000 for a non-endowed fund and \$50,000 for an endowed 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 Scholarship 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 Scholarship Fund and begin making a lasting difference for the causes you care about in our community!

Empowerment

Help shape the future by supporting educational opportunities for individual students in our community!



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