

# Community Investment Fee Schedule



KITSAP  
COMMUNITY  
FOUNDATION

When you partner with Kitsap Community Foundation, your community investment fee is reinvested locally to strengthen the capacity of all nonprofits in our region. By investing in the greater good, you help sustain and enhance the quality of life that makes Kitsap a place we're all proud to call home. Our comprehensive community investment fee covers a broad array of services to simplify your giving and strengthen your impact:

- Grantmaking, online access, gift reporting, and gift acceptance of marketable securities and complex assets
- Extensive philanthropic advising
- Robust nonprofit support helping nonprofits improve their philanthropy, reduce costs, collaborate with partners, deliver higher value, and increase their impact—making more missions possible in our community

## A HIGHER STANDARD OF STEWARDSHIP

Kitsap Community Foundation takes investment management very seriously. While our Board of Directors is ultimately responsible for oversight and investment management, the Board utilizes a multi-layered system of investment management, including:

- Funds stewarded by Kitsap Community Foundation are guided by a professional wealth management company that specializes in managing institutional charitable assets—understanding the need to have community impact today, while preserving assets to have future impact as well.
- Funds are annually certified by an independent professional audit firm. Audited financial statements and our Form 990s are easily accessible from the Foundation's website.
- Our accreditation from the Council on Foundations affirms that we meet the most rigorous standards for best practices, including a commitment to transparency and public accountability.
- An experienced Investment Committee of local professional advisors oversees our investment portfolio, ensuring that it is managed prudently and in alignment with the Foundation's board-approved Investment Policy Statement and legal obligations outlined in the Uniform Prudent Management of Institutional Funds Act (UPMIFA).
- An experienced Finance Committee of local experts to monitor the Foundation's financial health, ensuring strong fiscal stewardship, compliance with nonprofit financial best practices, and alignment with the Foundation's mission and strategic goals.

Our dedicated team is always just a quick phone call away, ensuring that your needs are met with personal attention and care. No impersonal call center queues, just real, local people invested in your success.

For more information, please contact our dedicated team at [info@kitsapfoundation.org](mailto:info@kitsapfoundation.org) or (360) 698-3622.



Fund Type	Fund Minimum	Community Investment Fee	Annual Minimum Fee
<b>Donor Advised Funds</b>			
Using the popular donor advised fund structure, a Community Philanthropy Fund allows you to actively engage in grantmaking. You may choose a successor advisor. You can also establish a DAF through your will to further your legacy beyond your lifetime.	\$10,000	1.25% - First \$999,000 1.0% - \$1 million+	\$300
A Family Foundation, also utilizing the donor advised fund platform, is a powerful way to bring family together around giving. This option offers enhanced benefits including engaging family members across generations, and in-depth philanthropic advising services.	\$10,000	1.25% - First \$999,000 1.0% - \$1 million+	\$300
<b>Designated Fund</b>			
Distributions from a Designated Fund are made to one or more nonprofit organization, in the percentages that you specify, providing support to the organizations that you value.	\$10,000	2%	\$300 \$300
<b>Area of Interest Fund</b>			
An Area of Interest Fund allows you to identify the charitable cause or geographical area you wish to impact. Your fund will provide ongoing support to organizations within your specified area of interest.	\$10,000	2%	\$300
<b>Community Catalyst Fund</b>			
Our Community Catalyst Fund is an unrestricted gift to the Foundation which allows you to invest in meeting the changing needs of the Kitsap Peninsula, including supporting the Foundation's operations.	\$10,000	2%	\$300
<b>Corporate Foundation</b>			
A Corporate Foundation is guided by a Philanthropic Advisor to create a strategic program that aligns with your company's business goals and provides the opportunity to engage employees and owners collectively.	\$10,000	2%	\$300
<b>Nonprofit Agency Fund</b>			
A Nonprofit Agency Fund can be structured as an Endowment, a Reserve Fund, or a Project-Specific fund that is managed on behalf of your organization and provides distributions in support of the organization's mission.	\$10,000	1.5%	\$300
<b>Scholarship Fund</b>			
A Scholarship Fund helps students pay for college and other post-secondary education. In establishing a scholarship fund, you are able to name the scholarship and specify broad academic priorities or student profiles.	\$30,000 True Endowments only	3%	\$300
<b>Short-Term Funds</b>			
Cash Equivalent Donations	\$2,500	2.5%	\$50
Complex Non-Cash Gifts, such as Real Estate, CRTs/CRUTs, etc. for NPOs with existing funds at KCF	\$2,500	3%	\$50
Complex Non-Cash Gifts, such as Real Estate, CRTs/CRUTs, etc. for NPOs without funds at KCF	\$2,500	7%	\$50
<b>Fiscal Sponsorship Fund</b>			
Percentage Fee for basic standard services; additional % dependent upon services required.		10%	\$300
Set Up Fee		\$750	
<b>Special Circumstance Fund</b>			
All amounts, dependent on volume and activity		Varies	\$300