



Change. Not Charity.

Liberty Hill Donor-Advised Fund Fees

Effective October 1, 2015

	Average DAF Balance	Annual Fee	Frequency
DAF ACCOUNTS WITH BALANCES UNDER \$40,000	Up to \$40,000	\$500 min.	Assessed quarterly (or annually for DAF's with smaller balances)
DAF ACCOUNTS WITH BALANCES \$40,000 AND ABOVE	\$40,000 to \$250,000	1.25%	
	the next \$250,001 to \$500,000	1.00%	
	the next \$500,001 to \$1,000,000	0.75%	
	the next \$1,000,000 and above	0.50%	

- Minimum contribution to start DAF: \$10,000
- Minimum contribution to start invested DAF: \$25,000 (minimum term: 6 months)
- Fees listed above are for routine and standard donor-advised funds.
- For advised funds with special conditions, additional fees may apply.

A **DONOR ADVISED FUND** is an account set up by an individual or business to handle charitable giving to organizations or specific areas of interest, while also benefiting from *Liberty Hill's* grant making and administrative expertise. This provides an opportunity to create an easy-to-establish, low cost and flexible vehicle for charitable giving as an alternative to direct giving or creating a private foundation.

You may need a *Liberty Hill Foundation* donor advised fund, if you...

- Receive a large inheritance or other financial windfall.
- Need an immediate tax deduction, but want to give grants over time.
- Want a foundation-like structure, without the administrative complications and cost.
- Want to reduce mail and phone solicitations from organizations.
- Want expert advice to ensure your contributions are making a real difference.

For your donor advised fund, *Liberty Hill* partners with you to provide you with...

- Personal and responsive customer service.
- Strategic philanthropic advice from a partner who shares your values.
- A streamlined grant making process.
- Prudent investment of your assets (when applicable)
- Expert vetting of organizations.
- Reports to assess your impact.
- A community rooted in a strong sense of shared missions.

Other donor programs are available. Ask Liberty Hill about:

- Giving Circles
- Scholarship Funds
- Advised Funds for Single Issue Programs

To get started today, please contact Donor Services at donorservices@libertyhill.org