

DESIGNATED FUND

Supporting specific charities over time.

This account lets you support a specific charity or cause over time. The Foundation will make annual donations to the charity you choose. And if that charity ceases to exist — or radically changes — our Board of Directors will redirect the funds to another charity that matches your original intent.

GIVE TO THE CHARITIES YOU CARE ABOUT MOST

- With an initial contribution of \$10,000 in cash or appreciated assets, you designate specific charities to receive a percentage of an annual allocation of funds.
- Create an account that automates annual gift giving.
- Recommend the investment program (*choice of two*) used for the account.
- Receive any earnings above the professional service fee, back into the account, tax free.
- Monitor account activity online, receive quarterly statements, and let us provide you with the necessary paperwork at tax-time.
- Receive recognition for your grants or remain anonymous.

GIVE WITH FLEXIBILITY

- You are eligible for a tax deduction upon receipt of your donation into the account.
- Avoid capital gains by donating long-term appreciated assets such as public or privately held stock, real estate, mutual funds, and life insurance into the account.

GIVE WITH CONFIDENCE

- Take advantage of our philanthropic services. Tell us what you want to accomplish or what you care about — we'll help you focus your resources to make the most impact.
- Keep updated on local, regional, and national news that's relevant to your interests and passion.

FOR MORE INFORMATION, CONTACT US AT [GIVING@OMAHAFUNDATION.ORG](mailto:giving@omahafoundation.org) OR (402) 342-3458.

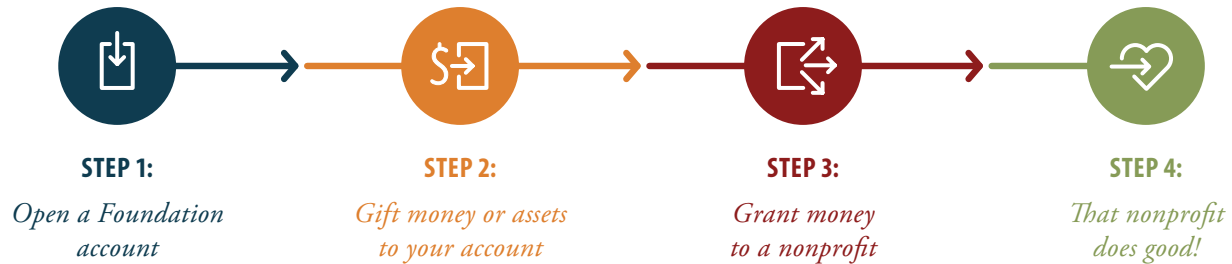


Omaha Community
Foundation

Let good grow.

Simplify your giving.

HOW YOUR PERSONAL GIFTS BECOME FOUNDATION GRANTS



DESIGNATED FUND FEES (PASS-THROUGH)

For non-endowed Designated Funds, all incoming gifts have a flat fee of 2.00%. Should the fund be established to last beyond five years, a minimum annual fee of \$500 will be incurred starting in the sixth year.

DESIGNATED FUND FEES (ENDOWED)

The professional service fee for endowed Designated Funds is a flat fee of 1.00%, with a minimum annual fee of \$500, and with declining fees above \$2 million (*see detail below*). Fees are assessed at the close of every quarter.

Fund fair market value	Flat fee
From \$25,000 up to \$2 million	1.00%
From \$2 million up to \$4 million	0.80%
From \$4 million up to \$7 million	0.65%
From \$7 million up to \$10 million	0.60%
Amount above \$10 million	0.50%
Additional rebates begin above \$25 million	

VARIANCE

The Fund will be held and administered as a component fund of OCF subject to the power of OCF to modify any restriction or condition which becomes unnecessary, incapable of fulfillment, or inconsistent with the mission of OCF. OCF agrees that if the Board proposes to exercise the variance power under Article IV of OCF Articles of Incorporation, the Board will first notify the Nonprofit in writing of (1) its intent to exercise such power, and (2) the manner in which the OCF proposes to vary the purposes, uses, or methods of administration of the Fund. If OCF ceases to be a qualified charitable organization or if OCF proposes to dissolve, the assets of the Fund shall, after payment or making provision for payment of any liabilities or other amounts properly chargeable to the Fund, be distributed to the Nonprofit.

FOR MORE INFORMATION, VISIT OMAHAFUNDATION.ORG.