

FIELD OF INTEREST FUND

Target your gifts to address a specific need in our community.

GIVE TO A SPECIFIC NEED THAT YOU CARE ABOUT MOST

- With an initial contribution of \$10,000 in cash or appreciated assets, you define the criteria for a grant program addressing an issue or cause that matters most to you.
- Create a lasting legacy of giving in your name, in honor of a loved one, or anonymously
- We manage annual selection of grant recipients using our staff, board, and/or local community experts who are knowledgeable about your cause or issue.
- 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.
- Receive a quarterly statement.
- Monitor account activity online.
- Consolidate your record keeping and let us provide you with the necessary paperwork at tax-time.

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.
- Create a gift that adapts to the ever-changing needs of your chosen issue in our community.

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 DENNIS@OMAHAFUNDATION.ORG OR (800) 794-3458.



Omaha Community
Foundation

Let good grow.

Simplify your giving.

HOW YOUR PERSONAL GIFTS BECOME FOUNDATION GRANTS



FIELD OF INTEREST FUND FEES

The professional service fee for Field of Interest Funds is 1.25%, with a minimum annual fee of \$300, with declining fees above \$1 million (see detail below). Fees are assessed at the close of every quarter at 0.3125% with a minimum of \$75.

Fund fair market value	Total annual fee	Quarterly assessment
Up to the first million	1.25%	0.3125%
From \$1 up to \$5 million	0.75%	0.1875%
From \$5 million up to \$20 million	0.50%	0.1250%
Amount above \$20 million	0.125%	0.03125%

- If the account is created for the first time through a gift from an estate distribution and is not endowed, a one-time administrative levy of 5% of the distribution will be assessed and will be deposited in the OCF administrative endowment.

FOR MORE INFORMATION, VISIT OMAHAFUNDATION.ORG/SWIOWA.