

PASS THROUGH 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.
- Give 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.

HOW YOUR PERSONAL GIFTS BECOME FOUNDATION GRANTS



GRANT PROCESS OPTIONS

Option A: Multi-year Cycle - Our staff surveys the landscape in your chosen area of interest and invites nonprofit organizations to apply for a grant, reviews the proposals once every 3 years and makes grant recommendations.* Annual grants are distributed over a period of 3 years (subject to a satisfactory receipt of an annual evaluation.)

Option B: Annual OCF Staff-led Decision - Our staff surveys the landscape in your chosen area of interest and invites nonprofit organizations to apply for a grant, reviews the proposals annually and makes grant recommendations.*

Option C: Annual Expert Committee Decision - Our staff works with you to identify a committee of experts in your chosen area of interest who convene annually to survey the landscape, invite nonprofit organizations to apply for a grant, review proposals and make grant recommendations.*

FIELD OF INTEREST PASS THROUGH FUND FEES

The professional service fee for Field of Interest Pass Through Funds is 5.00%, with declining fees above \$100,000 (see detail below). The minimum annual fee for accounts utilizing Grant Option A is \$500, Option B is \$1,500, and Option C is \$3,000. Fees are assessed at the close of every quarter.

Fund fair market value	Total annual fee
Up to \$100,000	5.00%
From \$100,000 to \$500,000	2.50%
From \$500,000 to \$1 million	1.25%
Amount above \$1 million	0.75%

- No cash gifts will be processed, only checks, credit card payments and various assets (dependant on OCF's gift acceptance policy.)

NOTES

**All grant recommendatins are made to the OCF Board Grants Committee for final consideration.*