



## Supporting specific nonprofits or causes over time.

A Designated Fund allows you to support a specific nonprofit or nonprofits long-term with the assurance that your philanthropic intent is preserved. The Foundation makes annual donations to nonprofits of your choice, with the guarantee that if a nonprofit ceases to exist—or radically alters their mission—we will redirect your funds to another cause matching your original intent.

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**Give with us to combine favorable tax benefits and flexibility.**

With an initial contribution of \$10,000 in cash or appreciated assets, you can designate specific nonprofit organizations to receive a percentage of an annual allocation of funds.

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Recommend the investment program (choice of two) used for your Fund.

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Receive any earnings above the professional service fee, back into your Fund, tax free.

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**Give to the causes and organizations you care about most.**

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.

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Stay connected on local, regional, and national philanthropic trends and news that's relevant to your interests or passions.

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**Enjoy specialized service, flexibility, and convenience.**

Monitor your fund activity online, receive quarterly fund statements, and the necessary paperwork at tax time.

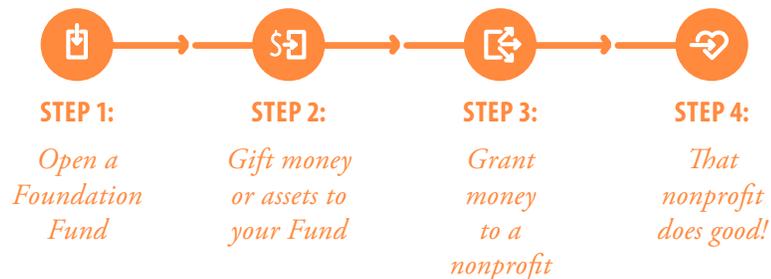
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Avoid capital gains by donating long-term appreciated assets into your Fund, including stock, real estate, mutual funds, and life insurance.

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Receive acknowledgment for your grants or choose to remain anonymous.

How your personal gifts become grants.



**Designated Fund fees (Pass-through).**

For non-endowed Designated Funds, all incoming gifts have a one-time, 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%, (i.e., paid out at a rate of 1.00% per annum), 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 \$10,000 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 the Omaha Community Foundation (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 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.