



# Community Impact Fee Schedule

Community Impact Fees support philanthropy and ensure effective grantmaking. Our competitive fees enable the Montana Community Foundation (MCF) to meet our mission of cultivating a culture of giving so Montana communities can flourish. Fees are established by the Board of Directors and reviewed annually. Annual fees are assessed monthly based on the monthly average fund balance.

<p><b>Donor Advised, Donor Designated, Affiliate, and Nonprofit Funds*</b> \$25,000 minimum**</p>	<p><b>Community Impact Fees</b> Up to \$1 Million      1.25% \$1 Million+            1.00%</p>
<p><b>Scholarship Funds*</b> \$100,000 minimum**</p>	<p><b>Community Impact Fees</b> Up to \$500,000      2.25% \$500,000- \$1 Million   2.00% \$1 Million            1.75%</p>
<p><b>Planned Gifts</b> <b>When benefiting an existing endowment</b></p> <ul style="list-style-type: none"> <li>• Deferred Gift Annuity/Other: \$2,500 minimum per gift transaction</li> <li>• Charitable Gift Annuity: \$5,000 minimum per gift transaction</li> </ul> <p><b>When benefiting a newly created endowment:</b></p> <ul style="list-style-type: none"> <li>• Deferred Gift Annuity/Other: \$5,000 minimum per gift transaction</li> <li>• Charitable Gift Annuity: Minimum contribution must be sufficient to yield a charitable value calculation of at least \$25,000</li> </ul> <p>There is a minimum annual fee of \$250 for year one (1) of the planned gift. After year one, the annual fee noted above applies.</p>	<p><b>Community Impact Fees</b> Up to \$1 Million      1.25% \$1 Million+            1.00%</p>

\*Non-permanent funds are subject to a 2.00% fee when grants are made from funds invested less than one year.  
\*\*Minimum may be accumulated over a 5-year period from initial gift.

## Additional Resources

- Our Community Impact Fees enable MCF to provide an unmatched level of service and expertise to our donors and benefiting nonprofit organizations. Contact our knowledgeable and professional staff at [info@mtcf.org](mailto:info@mtcf.org) or (406) 443-8313.
- Access your fund information 24/7 on the MCF portal. Check fund balance, view quarterly statements, and more. Visit [www.mtcf.org/myfund](http://www.mtcf.org/myfund) to get started.
- See reverse side for a complete list of fund descriptions.

# Fund Descriptions

Below are descriptions of the various fund options at the Montana Community Foundation.

## Donor Advised Funds

Donor Advised Funds (DAFs) are a popular fund type for donors who want to support various organizations while making grant recommendations throughout the year.

## Donor Designated Funds

Donor Designated funds are created by donors to benefit a specific nonprofit(s).

## LCF Affiliate Funds

LCF Affiliate Funds benefit local community foundations and the communities they serve.

## Nonprofit Funds

Nonprofit funds are created by nonprofits themselves for their own benefit. Grants from these funds provide permanent, reliable annual income.

## Scholarship Funds

Scholarship funds provide financial support to students pursuing advanced education or technical certification. They can be awarded annually or on a multi-year basis.

## Not sure which fund is the right option for you?

Our team can help you find the best option to meet your philanthropic goals while supporting the causes close to your heart. Contact us at [info@mtcf.org](mailto:info@mtcf.org) or (406) 443-8313.