

Advised Fund Options for Individuals

Deciding on the best vehicle to accomplish your charitable goals doesn't have to be overwhelming. Madison Community Foundation (MCF) offers a variety of funds for donors who would like to be involved in recommending grants to the organizations they support.

	Donor Advised Endowment Fund	Donor Advised Maximum Giving Fund	Donor Advised Passthrough Fund
Description	Permanent. Allows you to support multiple nonprofits using the fund's earnings.	Semi-Permanent. Allows you to support multiple nonprofits using the fund's earnings and principal.	Temporary. Allows you to support multiple nonprofits using the fund's full available balance.
Minimum Initial Contribution	\$15,000	\$100,000	\$1,000
Fundholder Involvement	Fundholders can recommend grants* of at least \$200 to nonprofits anywhere in the United States.	Fundholders can recommend grants* of at least \$200 to nonprofits anywhere in the United States.	Fundholders can recommend grants* of at least \$200 to nonprofits anywhere in the United States.
Spending Policy	Amount available each year under MCF's spending policy currently calculated as 4.25% of the fund's average value over 20 quarters.	Amount available each year under MCF's spending policy currently calculated as 4.25% of the fund's average value over 20 quarters. Must maintain a minimum balance of \$50,000 for 10 years.	Fund's entire balance is available for distribution.
Investment	Pooled and invested in either a diversified portfolio or a environmental, social and governance (ESG) portfolio. Investment expense: 0.7%	Pooled and invested in a specialized portfolio through Commonfund. Investment expense: 0.7%	No earnings available.
MCF Support	First \$1 million: 1.0% Second \$1 million: 0.8% Third \$1 million: 0.6% Fourth \$1 million: 0.4% \$4 million+: 0.2%	First \$1 million: 1.0% Second \$1 million: 0.8% Third \$1 million: 0.6% Fourth \$1 million: 0.4% \$4 million+: 0.2%	1.0% of contributions

MCF support covers the costs of operating the fund and supports MCF's work in the community.

* All grants are subject to approval by the MCF Board of Governors.