



Establishing Your Donor Advised Fund

Fund Origination Statement

Establishing your Donor Advised Fund involves a simple three step process.

First, the South Carolina Christian Foundation needs certain personal information in order to set up your account. This information is requested on the following pages. Please complete the remaining pages and return them to South Carolina Christian Foundation at the address below. Please give attention to the investment strategy and fees articulated on the final page.

Second, once this information is in our system, it will be used to construct an agreement contract articulating the partnership being established between you and South Carolina Christian Foundation. This will be sent to you after we receive the information below.

Third, having signed the agreement, you then will transfer or contribute to South Carolina Christian Foundation the assets you are using to fund your account initially. You are then prepared to use your fund.

Thank you for the opportunity to serve you in this way. We look forward to working closely with you to accomplish your generous giving goals.

Send all correspondence to:

In Greenville:

South Carolina Christian Foundation
7 Boyce Avenue, Ste. 100
Greenville, SC 29601

In Spartanburg:

South Carolina Christian Foundation
Post Office Box 2397
Spartanburg, SC 29304

Office: (864) 949-5802 • Mobile: (864) 378-6477 • Email: bmcdonald@sccfonline.org



SOUTH CAROLINA
CHRISTIAN FOUNDATION

Name _____ Spouse _____

Address _____ Phone (H) _____

_____ Phone (M) _____

City _____ ST _____ ZIP _____ Phone (O) _____

Email _____

Children's Names and Ages _____

Company/Employer _____

Fund Name _____

Spokesperson(s)/Advisors to the account _____

If the above listed are personally incapacitated, who is to oversee the account? _____

Please indicate the type of account being established:

Donor Advised Fund/ Family Foundation

Field of Interest

Endowment

Scholarship

Designated Fund

Other _____

Address for Statements (*if different from above*):

Type of asset being used in origination:

Address _____

Cash

Stocks

Bond

Real Estate

Business Interest

City _____ ST _____ ZIP _____

Approx. Assessed Value: _____

Signature

Date

**SOUTH CAROLINA CHRISTIAN FOUNDATION ("SCCF")
SCHEDULE OF EARNINGS AND COST SHARING**

Fund Administration and Annual Operating Expenses

Non Endowed Donor Advised Funds
And All Other Funds

The minimum initial gift to establish a fund within South Carolina Christian Foundation is \$5,000.00. Additional gifts can be made at any time. The minimum amount of one distribution is \$100.00.

It is SCCF's intention to always allocate back to each Donor Advised Fund as much of the earnings and gains as possible. Currently, to help fund SCCF's annual administrative and general operating cost, SCCF retains a small annual amount. This allocation to SCCF is made quarterly and is based upon the prior months ending balance and fee schedule below:

For Fund Balances up to \$5,000,000			For Fund Balances Over \$5,000,000		
	Amount	Annual Cost Allocation		Amount	Annual Cost Allocation
First	\$1,000,000	- 1.50%	First	\$5,000,000	- 1.22%
Next	\$1,000,000	- 1.35%	Next	\$5,000,000	- 0.95%
Next	\$1,000,000	- 1.25%	Balance		- 0.85%
Next	\$2,000,000	- 1.00%			

In June of each year an annual assessment of ¼% of 1% is distributed from each donor advised fund into SCCF's general fund. These funds are used for administrative costs and grant making to various causes as well as. This assessment demonstrates SCCF's control as required by the IRS. Earnings added to each fund are net of investment cost of 60 basis points (%0.60) assessed by then investment firm.

This schedule is subject to annual review by the Trustees of the South Carolina Christian Foundation.