



BERMUDA COMMUNITY
FOUNDATION

Donor Fund Fees*

Type of Fund	Endowed	Non-Endowed ¹	
		Fiscal Sponsorship ²	Programme/Campaign
Donor-Advised Cedarberry	2% 1% initially (1.5%) 2% at maturity	1% N/A	5% N/A
Designated	1%	2%	5%
Field of Interest	2%	2%	5%
Unrestricted	1%	As per BCF policy	As per BCF policy
Agency	1%	5%	N/A
Central Operating (Named)	0	As per BCF policy	As per BCF policy
Advisory Services ³	N/A or as determined by services	N/A or as determined by services	Hourly rate as determined by services

Contribution Minimums to Create a New Fund**

Donor Individuals (e.g., person, family, trust, estate, giving circle, community groups)

Type of Fund	Endowed	Non-Endowed
Donor-Advised Cedarberry ⁴	\$25,000 \$2,500	\$50,000 (no minimum for Programme/Campaign Funds) N/A
Designated	\$25,000	\$50,000
Field of Interest	\$25,000	\$50,000
Unrestricted (Named)	\$25,000	As per BCF policy
Agency ⁵	\$25,000	\$10,000
Central Operating (Named)	No minimum. Thank you for your support of BCF's mission	
Advisory Services	As determined by requested services	

Donor Entities (e.g., family-owned business, company, corporation)

Type of Fund	Endowed	Non-Endowed
Donor-Advised	\$50,000	\$150,000
Designated	\$50,000	\$100,000
Field of Interest	\$100,000	\$100,000
Unrestricted (Named)	\$100,000	\$100,000
Central Operating (Named)	No minimum. Thank you for your support of BCF's mission	
Advisory Services	As determined by requested services	

* Fees and fund minimums take effect January 1, 2015 (revised May 2016).

**A smaller initial gift may be considered if the donor sufficiently demonstrates that the fund will reach the minimum value through additional gifts by an agreed upon deadline.

1. Capped at \$25,000 per year, plus setup fees of \$250–\$500. A two (2) year spend-out on fiscal sponsorships applies unless otherwise agreed.

2. Fiduciary conduit services. BCF may act as a fiscal sponsor to any recognised, Bermuda-based charity or nonprofit programme. BCF's gift and

grant policies apply. Maximum of four (4) grant distributions per year. See policy.

3. BCF's fees on funds cover the cost of services related to fund administration. Additional advisory services may be provided for a fee on a case-by-case basis

4. Emerging philanthropist fund. See policy.

5. No payout until the Fund's principal reaches \$50,000, excluding promotions and special waivers. Quasi-endowment policy applies.