



Non-Advised Field of Interest Funds

A field of interest (FOI) Fund allows you to provide an ongoing, reliable, and permanent stream of support for specific areas of interest that you define. Your charitable giving interests have been shaped by your experiences and passions, and our team of charitable experts will ensure your charitable dollars will be utilized in meaningful ways to support your giving interest today and tomorrow.

FIELD OF INTEREST FUNDS ARE:

Personal: You establish a fund and invest in charitable organizations and causes you care about. The St. Louis Community Foundation (STLCF) will work alongside you and your professional advisor to meet your financial and giving goals.

Strategic: After you have determined the areas your fund will support, STLCF charitable giving experts will make annual distributions from your fund to the those areas.

Flexible: STLCF can accept a variety of gifts including bequests, appreciated securities, real estate, retirement plans and IRAs. Grants can be anonymous.

Accountable: After you determine the areas you would like to support through your fund, you can be assured STLCF will wisely invest, manage, and grant your charitable dollars. STLCF will seek out the best grantmaking opportunities and programs capable of achieving your overall objectives.

WHO SHOULD CONSIDER THIS TYPE OF FUND?

Donors who wish to make an impact in a specific area of interest, but do not want to select a specific organization. This fund is an excellent option for donors who wish to leave a legacy through an estate gift or bequest and beneficiary designations, or:

- Are committed to giving locally to make a difference in the communities they love
- Want to make charitable investments where they are most needed for generations to come
- Want to simplify giving



To establish a fund, please contact a member of the Giving Strategies Team:

(314) 588-8200 • givingstrategies@stlgives.org • stlgives.org

ST. LOUIS



**COMMUNITY
FOUNDATION**



BENEFITS

- You specify areas of interest
- STLCF board of directors determines the spending policy to protect the longevity of the fund
- STLCF monitors the areas you select to help ensure that the grant dollars are used as you intended
- Granting on a set schedule can further simplify the process
- You can give complex assets at fair market value (e.g., real estate, closely-held stock)
- You have the opportunity to name the fund after yourself or in honor of a family member or a friend
- Grants can be made anonymously
- You have the ability to leave a legacy

CONSIDERATIONS

Once you make your contribution to a FOI fund, the contributions are granted out by STLCF's board of directors in the area (s) of interest you have selected.

TAX ADVANTAGES

- You receive the maximum tax deduction available in the year the contribution is made.
- You reduce estate taxes with testamentary gifts.

MINIMUMS AND FEES

A FOI fund may be opened with \$10,000, and additional contributions can be made at any time thereafter. Investment management and consulting fees related to the investment pools are charged separately. Fees collected for funds held at the STLCF support the processing of grant checks, accepting and acknowledging donations, completing annual audits and reporting—and make you part of the change we enable in the communities we serve. Thank you for joining us to improve quality of life in our community.