



We Inspire and Mobilize Giving

You are passionate about our community, and we are too. Whether you want to organize and focus your giving, support a specific cause, work together to help make the Triangle region thrive for future generations, provide scholarships for students, or roll up your sleeves and get involved, Triangle Community Foundation is here to help.

We offer many different options for your giving, provide expertise about the needs and challenges in our region, and are committed to strong financial management.

Types of Funds

Field-of-interest funds are established to support unspecified programs or organizations in a general field of interest important to the donor. This fund serves as a permanent endowment, and the Foundation will carry out the purpose you choose, today and for generations to come. This is also a good fund option to support our Fund for the Triangle in perpetuity.

Designated funds are established by the donor to support one or more specific nonprofit organizations or programs. If a designated organization ceases to exist, the Foundation works with the donor or advisor to identify a similar program that maintains the spirit of the original charitable intent. This is also a good fund option to support our Fund for the Triangle in perpetuity.

Unrestricted funds are distributed through our Fund for the Triangle at the discretion of the Foundation's staff and board of directors. These important funds give us the flexibility to respond quickly to challenging issues in our community, as well as the ability to be strategic with our impact through our four focus areas.

Giving Circles are established by donors who are interested in pooling their charitable dollars to make a greater impact in the community. Giving circles have memberships, their own activities and events, and make grants as a group. Several giving circles and committee-advised funds are operating currently at the Foundation. Read more about the current Giving Circles making a difference in the Triangle in partnership with the Foundation.

Donor-advised funds are established by donors who wish to have the ability to make recommendations as to how all individual grants from the fund are spent. Although federal tax law requires that the Foundation make the ultimate decisions on grant distributions, Triangle Community Foundation makes every effort to follow our donors' wishes. Donor-advised funds are a tax-advantaged, convenient way to organize your personal philanthropy or corporate giving program. Read more about donor-advised funds.

Agency funds are established by nonprofit organizations using their operating reserves or endowments to benefit their organizations in perpetuity. These funds allow for access to our professional investment management and planned giving expertise. We believe in a strong local ecosystem of nonprofits, and protecting an organization's legacy is one of the ways that happens. Read more about agency funds.

Scholarship and award funds are established by donors who want to support a student's growth through educational opportunities or by recognition of success in a particular discipline. Donors may recommend an academic focus for their scholarship fund, eligibility criteria, and often work in committees to choose recipients. Read more about scholarship and award funds.

Become a Donor

You do not have to open a fund to give through the Foundation. We offer several other ways to give back to the community by partnering with us, whether you are a current fundholder or not.

1

Fund for the Triangle is the Foundation's unrestricted fund, set up to benefit directly our four focus areas in the arts, community development, the environment, and youth literacy, in perpetuity. We are dedicated to enhancing the lives of everyone in the Triangle, and one of the ways we are able to do that is by focusing direct funding, research, and convenings in these areas. We strongly believe that by making an impact through Our Focus, we can change the face of the future for our region. But we can't do it alone.

2

Hitchings Legacy Society membership is initiated by the donor(s) who wish to make an impact beyond their lifetime. Donors planning to leave all or a portion of their estate to Triangle Community Foundation are enrolled in this society upon disclosure to our staff. We have the expert resources to help with family and estate planning, so our donors can leave the legacy they so desire.

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Donate Now! Make a one-time donation to the fund of your choice, support our Fund for the Triangle, join a Giving Circle, Send a Kid to Camp, or become a Community Investor, and give back to our community.

How to Make a Gift

Often the greatest opportunities for giving occur when you are making other major business, personal, and financial decisions - writing or revising a will, considering the sale of a museum or real estate, planning for retirement, or receiving an inheritance. We can help you maximize these financial opportunities for yourself, your heirs, and the charitable causes you care about most.

We invite you to visit our website at www.trianglecf.org to view the various forms of donation accepted, as well as stock and wire transfer instructions.

Questions? Contact our Donor Development staff to learn more at 919.474.4000

Comprehensive Fee Schedule

Administrative Fees

Triangle Community Foundation charges an annual fee to cover the cost of charitable fund services. Fees depend on the type of fund, level of service, and investment selection. Custom services are available for additional fees depending on the complexity and scope of work. **Below is a comprehensive fee schedule for your reference.**

TYPE OF FUND	ADMINISTRATIVE FEES
Donor-Advised Designated Agency	1.00% First \$1 million, \$300 minimum annual fee 0.75% next \$2 million (\$1-3M) 0.50% next \$2 million (\$3-5M) 0.40% next \$5 million (\$5-10M) 0.25% amount above \$10 million
Field of Interest Unrestricted	1.75% \$500 minimum annual fee
Scholarship Award	2.0% for Core Services, \$500 minimum annual fee 2.5% for Enhanced Services, \$750 minimum annual fee

Investment Fees

These fees are separate from and in addition to the annual administrative fees paid to Triangle Community Foundation. Investment fees include custodial, consulting and asset management services and range from 4.0% to 0.9% per year, depending on the portfolio selected by the donor. Investment performance is reported net of investment fees, which are deducted by the managers and service providers prior to reported earnings.

Transactional Fees

Potential fees apply to credit card gifts and stock gifts and are separate from the Foundation's annual administrative fees. Contact our staff for specific transactions.