

Philanthropic Advisor Fees

*This Philanthropic Advisor Fee schedule applies to all funds
at The Community Foundation Martin-St. Lucie.*

Agency Fund	1%
Agency Endowment Fund	.75%
• \geq \$250,000	.5%
Community Grant Funds	2%
Corporate Funds	See DA Fee
Designated Fund	See DA Fee
Donor Advised Fund	
• First \$1million	1%
• Next \$1million	.6%
• Next \$2million	.3%
• Next \$3million	.1%
❖ Funds \$7 million and above contact TCFMSL to discuss a flat rate.	
Field of Interest Fund	1%
• Giving Circle Funds	Varies according to fund activity
• Neighborhood Funds	Varies according to fund activity
Common Good Fund	2%
Scholarship Fund	2%
The Community Foundation Martin - St. Lucie Endowment Fund	*

The minimum fee is \$250.00 per year. Fees are assessed to the fund on a monthly basis. The monthly fee equals one-twelfth of the annual fee, based on the average fair market value of fund assets for the month.