

Service Options	All donor-advised funds \$50,000	Center for Family Philanthropy \$250,000
<b>Minimum Fund Balance</b>		
<b>Philanthropic Planning &amp; Grantmaking Services</b>		
Philanthropic Advisor assigned to fund	•	•
Grant processing and due diligence	•	•
Online access to fund and Foundation information	•	•
No geographic limitations on grants	•	•
Philanthropic strategy sessions		•
Preparation of mission and values statements		•
Customized grant proposals within specified area of interest		•
Assistance soliciting, reviewing and evaluating grant proposals		•
<b>Information and education services</b>		
Donor Education Series	•	•
Extra Wish and donor-focused publications	•	•
Link to peers with related giving interests	•	•
Access to program staff's expertise	•	•
Personal site visits		•
Customized reports on a specific nonprofit or broad field of interest		•
Direct link to professional program staff		•
<b>Legacy Services</b>		
Deferred gift strategies	•	•
Unlimited successor advisors	•	•
Customized training for next generation		•
Family philanthropy meetings		•
Preparation of philanthropic legacy statements		•
<b>Investment Options</b>		
The Community Foundation Pool	•	•
The Community Foundation Money Market Fund	•	•
American Funds Mutual Funds	•	•
Recommend an investment manager		•