

ADMINISTRATIVE FEE SCHEDULE



COMMUNITY
FOUNDATION OF UTAH

The Community Foundation of Utah is a mission-driven organization ensuring a brighter tomorrow for Utah. Fees are the fuel for our community impact.

The administrative fee schedules for fundholders are below.

Donor Advised Funds

Opening Minimum	\$25,000
Contribution Fee	1%
Annual Balance Fee	1.05% or \$250* *whichever is higher

Endowed Donor Advised Funds

Opening Minimum	\$100,000
Contribution Fee	None
Annual Balance Fee	1.5%

Agency Endowments

Opening Minimum	\$100,000
Contribution Fee	None
Annual Balance Fee	1.5%

Corporate Advised Funds

Opening Minimum	\$100,000
Contribution Fee	5%
Annual Balance Fee	1.05% or \$500* *whichever is higher

Community Impact Funds

Opening Minimum	\$250,000
Contribution Fee	5%
Annual Balance Fee	1.05% or \$500* *whichever is higher

TO OPEN A FUND

Donors: donor@utahcf.org | Nonprofits: endowments@utahcf.org
801-559-3005 | www.utahcf.org