

Imprint

LEAVE YOUR MARK



Marin
Community
Foundation

Opening a fund at MCF is more than transferring assets. It's a declaration of trust.

This is especially true when you're looking to create a philanthropic legacy through your estate. You want to have the peace of mind that your intentions are both honored, and fulfilled precisely, when you're not here to manage the process.

We understand that. Which is why we've designed Imprint.

Imprint is MCF's custom legacy program. You can specify exactly how and when you want to give, and have complete confidence that your wishes will be carried out exactly as you intended.

- 01 Open the fund with a variety of assets. We can partner with you and your estate planner to identify the best approach for contributing to your fund.
- 02 Commit a minimum of \$1 million and receive expert philanthropic assistance in designing your grantmaking strategy. MCF offers a robust selection of giving vehicles to suit your needs.
- 03 Easily amend your fund at no cost. In fact, with Imprint there are no start-up costs, no attorney fees and no fund fees until your passing.
- 04 Enjoy the efficient administration oversight of a foundation with over four decades experience in legacy planning.
- 05 Know that MCF will be a diligent steward of your fund. If an organization ceases operation, changes its mission, accomplishes its goal, or undergoes any significant change, MCF will make sure your giving intentions are honored.

MCF has cumulatively granted more than \$2.7 billion in its history

MCF is consistently ranked in the top ten of community foundations in the country.

Low Fees

As with all funds at MCF, there is no fee for opening an Imprint fund. We have designed a fee schedule using a sliding scale model, below. For the first twelve months after an Imprint fund matures, MCF will charge a fee based on the total gifts made into the fund, based on this sliding scale.

After the first twelve months, the fee will be based on the **balance** maintained within the fund.

INCOMING GIFTS OR FUND BALANCE	SERVICE FEE
Up to \$500,000	0.75% (min. fee \$1,000)
The next \$500,000 - \$5 million	0.65%
The next \$5 million - \$20 million	0.50%
The next \$20 million - \$30 million	0.30%
Over \$30 million	0.12%

Investment Fees

MCF does not charge any investment fees, but third-party fees charged by investment managers are passed through to each fund. These typically range between 5 and 100 basis points annually, depending on the donor's investment allocation between the professionally-managed investment pools.

Expense on the Sale of Gifts

When brokers, agents, or others charge fees for liquidating stocks or other assets made as gifts to a fund (e.g. real estate), these fees are passed through to the fund.

More than 125 individuals
and families have entrusted
their legacy to MCF.

CONTACT US

Let's talk.



Andrea Henderson

VP, Philanthropic Planning
415.464.2507
ahenderson@marincf.org



Safia Kryger-Nelson

Director, Philanthropic Planning
415.464.2515
skryger-nelson@marincf.org

