



DESIGNATED FUNDS

For individuals and families that wish to support their favorite organization(s) in perpetuity.

Why create a designated fund at GWCF?

Provide lasting support to the organizations you love.

A designated fund ensures the nonprofits you care about receive reliable support year after year. Your fund continues to give in perpetuity, long after your lifetime, strengthening the organizations that matter most to you.

Trusted stewardship for your legacy.

GWCF holds your fund in a professionally managed endowment, providing investment oversight, administrative handling, and grant distribution. We ensure grants are made according to your wishes and aligned with nonprofit best practices and IRS guidelines.

Flexible giving that endures over time.

You or others may add to your fund at any time. If a named organization changes or ceases operations, GWCF helps identify qualified charities with similar missions, ensuring your legacy continues to support the work you intended.



IMPACT AT A GLANCE

In 2025

153

designated funds at the Foundation

\$1.4M

distributed through designated funds

\$40M

total assets in designated funds

142

nonprofits funded

87%

designated grants supported Worcester County nonprofits

Getting Started

1 CONTACT US

Our team is here to support you, and any trusted advisors you wish to work with. We'll take time to understand your **charitable goals** and help create a fund that aligns with your vision.

2 MAKE A GIFT

Designated funds begin awarding grants once the balance reaches **\$10,000**. We accept a wide range of gift types, from cash and appreciated securities to more complex assets.

3 ESTABLISH YOUR FUND

Most funds can be established within **two business days**. We'll work with you to complete the fund agreement, coordinate any complex gifts, and document your story and purpose.



Martin Family Fund

The Martin Family Fund is designated to support the Parenting Student Program at Quinsigamond Community College, which offers childcare and other vital resources to help parenting students succeed in school while raising their families.

This fund was inspired by fundholder Samantha's own journey as a young parent, originally dropping out of college and having her first child at 21. When she learned that the number one predictor of a person's education level is their mother's education level, she was determined to change that trajectory. With the support of her mother, Alexandra, Samantha returned to college and later earned a law degree.

Together, Alexandra and Samantha created this fund to help other students who are navigating the challenges of parenting while pursuing higher education.

EXAMPLE

\$25,000 Designated Fund

A **\$25,000** designated fund can award **\$1,000 annually** to your selected nonprofit, based on the Foundation's 4% spending policy.

With an average **6.5%** annual investment return over the past 10 years¹, your fund can grow while supporting your chosen organization.

¹Average for Foundation's traditional portfolio. Past investment performance is not a guarantee of future results.

SUPPORT FEES

Fund balances **up to \$5 million**:
1.25% of fund's total market value

Balances **above \$5 million** are charged a reduced 1% fee

Support fees are used exclusively to support the mission-based operations of the Foundation.

Investment fee: 0.05% to 0.75%, depending on portfolio.

"GWCF is an **established community partner** with a great deal of experience ... The idea of having reliable people "in the know" who will be able to **guide the use of our funds** long past when we can, and with significantly more expertise than we have, was comforting and appealing."

Samantha McDonald



CONTACT

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