

DONOR ADVISED FUND PARTNER COMPARISON CHART



ATLANTA*

Organization	Minimum Initial Contribution	Minimum Grant to Non Profit	Accepts Illiquid Assets?	Annual Pooled Trust Administration Fee**	Investments Can be Managed by SigFD
Cobb Community Foundation	None	\$50	Yes	1.5% for first \$1M	Yes for accounts > \$250,000
Community Foundation for Greater Atlanta	None	\$100	Yes	1% for first \$500,000 \$1,000 minimum fee for standard accounts \$2,500 minimum fee for personalized philanthropic service funds invested in CFGA's investment vehicles \$5,000 minimum fee for separately managed accounts	Yes
Fidelity Charitable	\$5,000	\$50	Yes	.6% for first \$500,000	Yes for accounts > \$250,000
Jewish Federation of Greater Atlanta	\$2,500	\$100	Yes	1% for first \$500,000	Yes for accounts > \$250,000
National Christian Foundation	None	None	Yes	1% for first \$1M \$240 minimum annual fee	Yes for accounts > \$300,000
Schwab Charitable	\$5,000	\$50	Yes	.6% for first \$500,000 \$100 minimum annual fee	Yes for accounts > \$250,000

Updated July 2020

*This is a sample list of DAF partners. Please ask your advisor for more options.

**These organizations use a sliding fee scale for accounts above certain levels. Please reach out to the SignatureGENEROSITY team for more information.

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CHARLOTTE*

Organization	Minimum Initial Contribution	Minimum Grant to Non Profit	Accepts Illiquid Assets?	Annual Pooled Trust Administration Fee**	Investments Can be Managed by SigFD
Fidelity Charitable	\$5,000	\$50	Yes	.6% for first \$500,000	Yes for accounts > \$250,000
Foundation for the Carolinas	\$10,000	None	Yes	.85% for first \$1M	Yes for accounts > \$250,000
National Christian Foundation	None	None	Yes	1% for first \$1M \$ 240 minimum annual fee	Yes for accounts > \$300,000
Schwab Charitable	\$5,000	\$50	Yes	.6% for first \$500,000 \$100 minimum annual fee	Yes for accounts > \$250,000

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