



Corporate Advised Fund Agreement

(Choose one)

- Establish a New Fund
- Update Fund Information

Name of Fund

E.G., ABC CORPORATE FUND

*CORPORATE INFORMATION

COMPANY NAME

BUSINESS PHONE (MAIN NUMBER)

MAILING ADDRESS

FAX

CITY

WEBSITE

STATE

ZIP

REFERRED TO SVCF BY

CONTACT #1

*Role:

- Fund Advisor:** Individual has full advisory privileges over a fund, including grant recommendations, investment recommendations, naming of successor advisors and other fund administration advisory privileges.
- Secondary Advisor:** Individual has full advisory privileges over grant recommendations but no other fund administration advisory privileges.
- Fund Representative:** Individual has access to fund information but no advisory privileges.
- Communications Contact:** *This individual will be the primary point of contact to receive communications related to the fund. (Only designate one contact for this function)*

*FIRST NAME

*LAST NAME

*TITLE

* MR MS MRS DR | * MALE FEMALE

MAILING ADDRESS

CITY

STATE

ZIP

*DIRECT PHONE

MOBILE PHONE

FAX

*EMAIL ADDRESS

* = required

Corporate Advised Fund Agreement

CONTACT #2

*Role: (choose one)

- Fund Advisor:** Individual has full advisory privileges over a fund, including grant recommendations, investment recommendations, naming of successor advisors and other fund administration advisory privileges.
- Secondary Advisor:** Individual has full advisory privileges over grant recommendations but no other fund administration advisory privileges.
- Fund Representative:** Individual has access to fund information but no advisory privileges.
- Communications Contact:** *This individual will be the primary point of contact to receive communications related to the fund. (Only designate one contact for this function)*

*FIRST NAME	*LAST NAME
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*TITLE

* MR MS MRS DR | * MALE FEMALE

MAILING ADDRESS

CITY	STATE	ZIP
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*DIRECT PHONE

MOBILE PHONE

FAX

*EMAIL ADDRESS

CONTACT #3

*Role: (choose one)

- Fund Advisor:** Individual has full advisory privileges over a fund, including grant recommendations, investment recommendations, naming of successor advisors and other fund administration advisory privileges.
- Secondary Advisor:** Individual has full advisory privileges over grant recommendations but no other fund administration advisory privileges.
- Fund Representative:** Individual has access to fund information but no advisory privileges.
- Communications Contact:** *This individual will be the primary point of contact to receive communications related to the fund. (Only designate one contact for this function)*

*FIRST NAME	*LAST NAME
-------------	------------

*TITLE

* MR MS MRS DR | * MALE FEMALE

MAILING ADDRESS

CITY	STATE	ZIP
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*DIRECT PHONE

MOBILE PHONE

FAX

*EMAIL ADDRESS

Corporate Advised Fund Agreement

ANONYMITY AND PUBLICITY

SVCF includes information about fund advisors, grantees and funds in our e-newsletters, magazines, website and other printed and online materials. Please check all that apply.

- Do not list the corporation on donor or fund advisor listings.
- Do not include the fund name on fund listings..
- We are willing to be featured in SVCF's print and online publications.
- We are willing to be interviewed for media stories pertaining to SVCF.

FUND CREATION

Initial gift to establish a fund: \$ _____

Type of Gift:

- Check made payable to Silicon Valley Community Foundation
- Publicly Traded Securities[‡]
- Privately Held Securities[‡]
- Other[‡]
- Restricted Securities[‡]
- Physical Stock Certificates[‡]
- Wire[‡]

PLEASE DESCRIBE THE GIFT (INTERFUND TRANSFER, PERSONAL PROPERTY, REAL ESTATE, TESTAMENTARY):

[‡]Additional information will be required. Please contact SVCF at 650.450.5444 or donate@siliconvalleycf.org.

CORPORATE ADVISED FUND CUSTOM GRANT LETTER

Each grant made from a corporate advised fund is mailed with a grant letter. This letter has a header indicating the fund name, unless anonymity is requested. A fund advisor or secondary advisor may select anonymity on a grant-by-grant basis.

- Please make all grants from the fund anonymous.

CONTACT OPTIONS BY NONPROFITS

An organization that has received grants from the fund may wish to send information to your corporation. Please indicate your contact preference for the custom grant letter:

- Provide our corporation's address.
- Do not provide our corporation's address.

Mail received by SVCF for the corporate advised fund will not be forwarded.

For Internal Use Only:

- Basic
- Plus
- Premium

Corporate Advised Fund Agreement

ACKNOWLEDGEMENT AND SIGNATURES

I acknowledge that I have read Silicon Valley Community Foundation's Corporate Support Fees and Minimums and Fund Terms and Conditions and agree to the fees, terms and conditions described therein. I understand any contribution, once accepted by SVCF's board of directors, represents an irrevocable gift to SVCF. SVCF's board of directors has variance power under IRS regulations, and this gift is not refundable to the donor.

I hereby certify, to the best of my knowledge, that all information presented in connection with this form is accurate, and I will notify SVCF promptly of any changes.

At least one fund advisor must sign.

*FUND ADVISOR SIGNATURE

*PRINT NAME

*TITLE

*DATE

CORPORATE CONTACT SIGNATURE

PRINT NAME

TITLE

DATE

CORPORATE CONTACT SIGNATURE

PRINT NAME

TITLE

DATE

SVCF SIGNATURE

PRINT NAME

TITLE

DATE

SPECIAL INSTRUCTIONS:

Fund Terms and Conditions

TAX STATUS OF CONTRIBUTION

Funds established at Silicon Valley Community Foundation ("SVCF") are component funds of SVCF, a Section 501(c)(3) public charity. Certain contributions other than cash or marketable securities must first be approved by SVCF. All contributions to SVCF's funds are treated as gifts to a public charity and are generally tax-deductible, subject to individual limitations. SVCF does not provide tax or legal advice; we recommend consulting a professional advisor with questions about a gift to SVCF.

VARIANCE POWER

As required by law, all assets contributed to funds become irrevocable gifts to SVCF, and legal control and responsibility for the funds rest with SVCF. All funds established at SVCF are subject to SVCF's variance power, subject to individual limitations, as set forth in SVCF's bylaws. Variance power gives SVCF the authority to modify any restriction or condition on the distribution of funds for any specified charitable purposes or to specified organizations if, in the sole judgment of SVCF's board of directors, such restriction or condition becomes unnecessary, incapable of fulfillment or inconsistent with the charitable needs of the community served.

INVESTMENT OF ASSETS

In making a gift to SVCF, donors give up all right, title and interest to the assets contributed. In particular, donors cannot choose investments, investment managers or brokers after their gift has been made, with the exception of a recommended customized investment approach as stated below. The board of directors and investment committee of SVCF have the right to make any or all investment decisions regarding gifts received, except that fund advisors have advisory privileges with respect to fund investments. All assets contributed to funds will be managed in SVCF's investment pools, subject to certain approved exceptions. Investment allocations among SVCF's investment pools can be changed no more than once per calendar year, unless a significant change to grantmaking or fund balance occurs and prudence requires a change. SVCF may hold up to 5% of fund assets in non-interest bearing cash at any time. All income and capital gains or losses will be allocated to the fund on a monthly basis.

A donor may recommend a customized investment approach through an outside investment advisor for funds carrying a significant balance. SVCF's investment committee must approve the recommended advisor, the advisor's proposed investment strategy and underlying investments.

FEES AND MINIMUMS

There is no set-up fee to open a fund at SVCF, with certain exceptions; however, specific initial gift minimums must be met. Initial gift minimums vary by fund type. Once established, funds are required to maintain a minimum balance and are subject to support and investment fees. Fee information is available upon request. SVCF reserves the right to change its fee or minimum policies at any time.

ROLE OF ADVISORS

Donors establishing an advised fund may designate any person over 18 years of age to be an advisor on the fund. A fund can have more than one fund advisor but preferably no more than three. If a fund is advised jointly, upon the death of one fund advisor, the remaining fund advisor(s) retains the privileges associated with the fund.

SUCCESSOR ADVISORS

The donor and any fund advisor may designate any person within one generation to be a successor advisor to exercise the privileges and duties of a fund advisor. Successor advisors may assume the privilege to advise the fund only after the deaths or resignations of all initial fund advisors named on the fund. The successor advisor(s) may be required to provide written notification and sufficient proof of the donor's or fund advisor's death prior to assuming the privileges and duties of a fund advisor. Successor advisors may not appoint further successors but may appoint additional fund advisors as long as they are in the same generation as the successor advisor. If the successor advisor is a minor, SVCF's board of directors reserves the right to require that grant recommendations be made by the minor's legal guardian.

All requests to modify or appoint additional advisors and successor advisors to a fund must be communicated to SVCF in writing. In addition, a written acknowledgement must be received from SVCF confirming that the request has been granted. If SVCF has not received the name(s) of an additional advisor(s) or successor advisor(s) to the fund, or other special instructions, in writing, SVCF will use the fund's balance to support SVCF's Community Endowment Fund.

The Fund Advisory Privileges and Fund Relationship Definitions on page 6 further explain the role of advisors and other interested parties to funds at SVCF. These terms correlate to the Fund Agreement forms and will determine the fund's contacts and advisors.

Fund Terms and Conditions

FUND RELATIONSHIP AND FUND ADVISORY PRIVILEGES DEFINITIONS:

Fund Advisor: Individual has full advisory privileges over a fund, including grant recommendations, investment recommendations, naming the fund and appointment of other fund advisors and successor advisors. (This is the highest level of authority.)

Secondary Advisor: Individual also has full advisory privileges over grant recommendations but has no other fund administration advisory privileges. (This is an intermediate level of authority.)

Fund Representative: Individual has access to fund information but no fund advisory privileges. (This is the lowest level of authority.)

Successor Advisor: The second generation fund advisor; he or she has no advisory privileges until the cessation to act of all initial fund advisors. (Primarily for donor advised funds, committee advised funds and scholarship funds.)

Communications Contact: This individual will be the initial point of contact to receive communications related to the fund. Only one contact may be designated to serve this function. This individual may or may not have fund advisory privileges, and must not be a successor advisor.

FUND SPENDING POLICY

SVCF recommends a minimum 5% annual distribution rate for all funds. For endowed funds, SVCF's board of directors sets and monitors a required annual distribution rate that is calculated as a percentage of fund assets. This rate is based on 12 trailing quarter balances and is subject to change based on community needs, investment performance and the long-term preservation of endowment funds' principal. An endowed fund must be invested for a minimum of 12 months before the fund's initial annual distribution rate can be calculated.

GRANT DISBURSEMENT

Grants must be for charitable purposes, and those grants may be recommended to any 501(c)(3) organization or verified charitable entity (e.g. schools, religious institutions) located in the United States or any nongovernmental organization outside of the United States having a verifiable charitable purpose. All grants directed outside of the United States must comply with federal government regulations, and the prospective grantee must be verified as the equivalent of a public charity within the United States and must otherwise conform to all relevant U.S. federal and state laws. Grants may also be given for charitable purposes to non-501(c)(3) organizations if the charitable expenditure can be verified through a process called expenditure responsibility. Expenditure responsibility is required for any organization not described in IRS Section 170(b)(1)(A), including for-profit companies, private operating foundations and new public charities that do not yet have 501(c)(3) status and disqualifying supporting organizations.

Grants given to all 501(c)(3) public charities within the United States must be for a minimum of \$200 USD. Grants to organizations outside of the United States for which SVCF has an Equivalency Determination Certificate or grants requiring expenditure responsibility within the United States must meet a minimum of \$1,000 USD. Grant payments sent to organizations are accompanied by an SVCF letter specifying the name of the fund and the fund advisor's name(s) unless requested otherwise by the donor or fund advisor and as approved by SVCF. The fund advisor's address may also be included on all letters if requested by the fund advisor. Mail that SVCF receives for the fund will not be forwarded. Approved grants are typically sent within 7 to 10 business days. However, any fund submitting twenty or more grant recommendations at one time should allow up to 12 business days for processing. Grants made from funds at SVCF are issued on checks with the name and logo of SVCF.

SVCF shall assume responsibility for check writing, payment processing, bookkeeping, investment management, tax reporting, auditing and evaluation of projects, and for making available to the fund advisors and fund representatives reports of fund income, expenses and grantmaking, as appropriate.

RESTRICTIONS ON GRANTS

In compliance with the Internal Revenue Code, grants are not permitted to individuals; for non-charitable purposes; for political contributions or to support political campaign activities; or for any purpose that would provide benefits, goods or services to a donor to the fund, the fund's advisor(s) or other related parties. A fund advisor is subject to IRS penalties if the fund's donor(s), advisor(s) or other related parties receive benefits, goods or services in connection with a grant recommendation. This includes grants to satisfy pledges made by any person, including a fund advisor, and non-deductible (or partially tax-deductible) memberships, event tickets, sponsorships, registration fees in tournaments and cause-related marketing activities. Grants are generally not allowed to private non-operating foundations, unless certain exceptions are met. Please contact SVCF if you have questions about the exclusion of benefits from grant recommendations and/or multiple-year payments.

Fund Terms and Conditions

PAYMENTS FROM AN ADVISED FUND

SVCF does not permit expense reimbursements, loans, compensation or other similar payments from an advised fund to any donor, fund advisor or related party. All expenses must be paid by SVCF directly after appropriate review of the expenses and their payees, and all expenditures must be preapproved by SVCF prior to being incurred. The expense submitted for review must be charitable in nature or support a charitable purpose.

FUNDRAISING POLICY

On rare occasions, SVCF may consider permitting a fund to raise money. All fundraising activities must be pre-approved by SVCF. Fund advisors must allow at least 30 days for approval. Use of SVCF's name on any fundraising material is expressly prohibited without prior written approval by SVCF. SVCF cannot reimburse the donor, fund advisor or related parties for expenses related to fundraising activities. All contributions raised in support of the fund must be made payable to Silicon Valley Community Foundation or SVCF with the name of the fund in the memo line. SVCF is not responsible for the success of fundraising activities.

MEMORIAL FUNDS

A memorial fund can be established in honor of someone who has passed away, and requests for donations in the name of the deceased to SVCF are required to use the following language in obituaries or solicitations for gifts: "Funds raised will be added to the [insert name] Fund at Silicon Valley Community Foundation, a 501(c)(3) organization. All checks must be made payable to Silicon Valley Community Foundation or SVCF with [insert name] Fund in the memo line."

Names of donors to memorial funds will be disclosed to memorial fund advisors; however, specific gift amounts will not.

SCHOLARSHIP FUNDS

For any scholarship fund established at SVCF, the scholarship selection committee must be appointed by SVCF; however, members may be recommended by the donor. The donor and parties related to the donor may serve on the selection committee but they cannot directly or indirectly control the committee. As required by law, the scholarship selection process must be approved annually by SVCF's board of directors. SVCF disburses scholarship funds to the institution the recipient attends and will not disburse a grant to a specific individual.

DESIGNATED FUNDS

Designated funds can only be established for the benefit of one qualified public charity. If that organization ceases to exist or dramatically changes its charitable purpose, SVCF will use its

variance power to find a similar organization that matches the donor's intent. Should the donor request that the organization be changed, all remaining assets will be granted to the original organization and a new fund must be established.

FUND INACTIVITY

Inactivity is when no grant recommendations are received for a period of one year and the fund advisor(s) cannot be contacted. SVCF's staff will attempt to contact the fund advisor(s) at least three times via certified mail. If contact cannot be made, SVCF's board of directors will advise an annual payout to support the community grantmaking program in accordance with SVCF's spending policies. If no contact from the advisor is made within a year, the fund in its entirety will be transferred to the Community Endowment Fund. For avoidance of doubt, a fund must have inactivity for a total of two years before being transferred to the Community Endowment Fund.

FUND CLOSURE

A fund advisor may recommend closing a fund by granting up to 100% of the fund balance to a qualified charitable organization, including any of SVCF's funds (e.g., field of interest funds, endowment funds, operating funds). Such recommendations must be received in writing, and, if approved, funds will be disbursed in accordance with SVCF's current grantmaking policies and applicable laws and regulations. Closing a fund by recommending a grant to another qualified charitable organization which is approved will occur as follows: 80% of the current balance will be granted within 10 business days of the request date, barring any issues with the organization's status as a qualified public charity or equivalent. The remaining balance of the fund, including any residual net earnings, will be granted within the following 45 days. Endowed funds are permanent and cannot be closed.

CONFLICT OF TERMS

In the event of an inconsistency between these terms and conditions and any terms and conditions appearing elsewhere in connection with any fund, these terms and conditions, as interpreted by SVCF, shall govern, and SVCF reserves the right to take any actions at any time which, in its discretion, it deems reasonably necessary or desirable for the proper administration of any fund at SVCF or to comply with applicable law.

Fund Terms and Conditions

FREQUENTLY ASKED QUESTIONS

What is a corporate advised fund?

A corporate advised fund is not a separate legal entity like a trust or a corporation. It is a fund defined by the IRS that a sponsoring charity, like SVCF, creates through a written agreement with a donor. The donor contributes assets to SVCF, which agrees to treat those assets as a separate fund on its books, while the donor retains the privilege of recommending charitable grants from the fund and allocating investments of the fund's assets.

Who owns the assets once the gift is made and the fund is opened?

The law requires SVCF to make clear in the agreement, and to obtain the donor's written acknowledgement, that the assets in a corporate advised fund are the property of SVCF and that SVCF has discretion and control over the use and investment of the corporate advised fund's assets.

Why are discretion and control at issue?

In order for a donor to take advantage of the tax benefits that flow from a charitable gift, the gift has to be complete—that is, the donor has to part with control over the donated assets. The appearance of donor control could put the donor's tax deduction in jeopardy. Therefore, fund advisors cannot make pledges on behalf of the fund and can only make non-binding recommendations about grants; they cannot control when and how SVCF will make grants nor control decisions about which grantees will receive funding.

What are the limits on donor benefits in connection with corporate advised fund grants?

Donors, fund advisors and related parties (such as family members or business interests) may receive only "incidental" benefits from a grant or investment of a corporate advised fund. If a donor, fund advisor or related party receives more than an incidental benefit in connection with a corporate advised grant, the IRS will assess a penalty of 125% of the amount of the improper benefit. The penalty may be assessed against either the person who recommended the grant or the person who received the benefit. (There is a separate penalty if a donor, fund advisor or related party receives a direct distribution from the corporate advised fund, such as compensation or an expense reimbursement.)

Please return this form to:

Silicon Valley Community Foundation
Attention: Development Department
2440 West El Camino Real, Suite 300
Mountain View, California 94040-1498

Phone: 650.450.5444

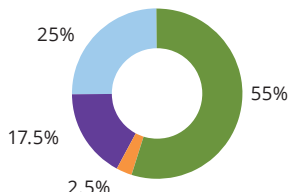
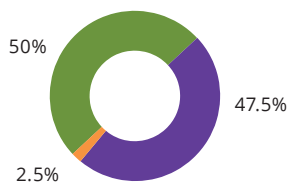

Fax: 650.450.5401

donate@siliconvalleycf.org

Contact SVCF at donate@siliconvalleycf.org or 650.450.5444 if you have questions.

SVCF offers three investment pools to meet your philanthropic objectives. We recommend that you review your expected grantmaking time horizon and investment allocations annually. Please contact us if you have significant changes in your philanthropic objectives. SVCF will maintain your fund's allocation through regular monthly rebalancing.

All pools benefit from purposeful asset allocation, diversification and best-in-class manager selection to achieve the highest expected returns within an acceptable level of risk. Investments are monitored regularly by SVCF's experienced investment committee, consultant and staff. Select an investment option that is aligned with your grantmaking horizon.

	INVESTMENT OPTIONS	OBJECTIVES AND EXPENSES
HIGHER VOLATILITY ↓ LOWER VOLATILITY	<p>Long-Term Pool Grantmaking timeline: 7 years or more</p> 	<p>Seeks long-term growth through a diversified portfolio of global stocks, bonds and alternative investment strategies.</p> <p>55% global equity, 17.5% fixed income, 25% alternatives and 2.5% cash 7% -8% average annual return objective 0.90% estimated annual investment expenses</p>
	<p>Medium-Term Pool Grantmaking timeline: 3-6 years</p> 	<p>Seeks moderate growth and risk through a balanced portfolio of global stocks and bonds.</p> <p>50% global equity, 47.5% fixed income, and 2.5% cash 5.5%-6.5% average annual return objective 0.50%-0.60% estimated annual investment expenses</p>
	<p>Short-Term Pool Grantmaking timeline: 0-2 years</p> 	<p>Seeks to maintain the value of contributions for short-term grantmaking.</p> <p>65% U.S. and global fixed income, 35% cash No annual return objective. SVCF guarantees no investment loss. 0% investment expenses</p>
	<p> ■ Global Equity ■ Fixed Income ■ Alternatives ■ Cash </p>	

Return objectives are net of fees over full market cycles of seven years or more. Actual returns will fluctuate and may be negative from year to year. Alternative investments include hedge funds, private equity and real assets, which are included to enhance returns, dampen volatility and hedge against inflation. Investment expenses include investment management, consulting, administration and custody fees, etc. Investment expenses may vary due to changes in the portfolio or performance-based fees in alternative investments.

Expenses do not include the support fee charged by SVCF.

Please connect with your SVCF staff contact or email investmentpools@siliconvalleycf.org with questions or call 650.450.5400.



Investment Allocation

Name of Fund

E.G., SMITH FAMILY FUND OR ABC CORPORATE FUND

- New Fund
- Existing Fund # _____

Please indicate your recommended investment pool allocation below. The total must equal 100%. Refer to the Investment Options information on the page that follows or visit siliconvalleycf.org for a description of each investment pool.

_____ %	Long-Term Pool	For funds with expected grantmaking timelines of seven or more years.
_____ %	Medium-Term Pool	For funds with expected grantmaking timelines of three to six years.
_____ %	Short-Term Pool	For funds with grantmaking timelines of up to two years.
_____ %	Total	

Future contributions will be invested according to the allocation specified above. Investment allocations can be changed through written instruction once per calendar year or upon a significant change in distribution goals. Reallocations occur on the first business day of the month.

FUND ADVISOR SIGNATURE

DATE

Please connect with your SVCF staff contact or email investmentpools@siliconvalleycf.org with questions or call 650.450.5400.

Important Information

Investment returns and principal value will fluctuate such that investments in the Medium-Term and Long-Term pools, when redeemed, may be worth more or less than their original cost. A portion of the Medium-Term and Long-Term pools is held in liquid investments to provide for distributions. Please see SVCF materials on fees and minimums and terms and conditions for more information.

This publication is a service to provide general information. SVCF is not engaged in rendering legal, financial or tax advice; as such, please consult with your financial or legal advisor.

Corporate Support Services and Fees

CORPORATE RESPONSIBILITY AND PHILANTHROPY SERVICES	Basic	Plus	Premium
Account Managers and Online Resources			
Access to a dedicated corporate responsibility manager as your point of contact for all SVCF services to ensure consistent, personalized consultation	x	x	x
24/7 online access to fund account and resources	x	x	x
Philanthropic Consultation and Program Management			
Oversight of grants processing from the fund	x	x	x
Annual consultation with SVCF staff on corporate philanthropic program, including strategic planning, program development, custom employee training and grantmaking best practices		x	x
Facilitation of annual grantmaking program, including compilation, review and analysis of up to 50 nonprofit grant applications per year		x	
Facilitation of annual grantmaking program, including compilation, review and analysis of up to 150 nonprofit grant applications per year			x
Training for corporate grantmaking committee on topics related to company's giving program			x
Management of grantmaking program on company's internal or commercial database			x
Outcomes and Impact Measurement			
Annual report on philanthropic activity in fund	x	x	x
Collection and dissemination of grantee final reports to company contact(s)		x	x
Custom impact analysis of funding and grantmaking activity			x
Nonprofit Partnership Development Services			
Ad hoc research and recommendations on subjects of interest or potential nonprofit partners	x	x	x
Consultations with potential and current grantees about the corporate giving program		x	x
Ad hoc proposal review and proposal support for potential grantee(s)		x	x
Facilitation of up to six site visits in the Bay Area annually to potential nonprofit partners			x
Grants Administration			
Due diligence, grant review and grant payment for an unlimited number of U.S. 501(c)(3) public charities, U.S. public entities and international organizations for which SVCF holds an active Equivalency Determination Certificate	x	x	x
Due diligence, grant review, grant agreement and grant payment for up to 25 non-501(c)(3) U.S. organizations and/or non-U.S. organizations for which SVCF does not hold an active Equivalency Determination Certificate		x	
Due diligence, grant review, grant agreement and grant payment for up to 75 non-501(c)(3) U.S. organizations and/or non-U.S. organizations for which SVCF does not hold an active Equivalency Determination Certificate			x
Custom award letter templates, including company guidelines and language		x	x
Custom grant coding, to allow budget tracking of grants across programs/regions			x

Corporate Support Services and Fees

CORPORATE RESPONSIBILITY AND PHILANTHROPY SERVICES	Basic	Plus	Premium
Fund Investment Management and Financial Services			
Expert guidance on the choice of one or more of SVCF's five investment pool options	x	x	x
Access to world-class investment managers and alternative investment strategies only available to large institutional investors	x	x	x
Management of your fund's investment pool, including quarterly fund statements and review, and convenient 24/7 online fund access	x	x	x
Quarterly fund statements through an online portal that details all fund activity, including gifts added to the fund, grants paid from the fund, investment pool activity and support fees	x	x	x
Acceptance of gifts of complex assets such as real estate and pre-IPO stock*	x	x	x
Marketing Services and Resources			
Link to your community relations/CSR website from SVCF website	x	x	x
Highlight of corporate responsibility success stories on social media, and in collateral materials and/or press releases, as applicable	x	x	x
Invitations to SVCF investment briefings and networking, education and convening events	x	x	x
Access to corporate responsibility-focused quarterly e-newsletter	x	x	x

CORPORATE SUPPORT FEES

Silicon Valley Community Foundation assesses support fees to cover the cost of administration and to continue our important work in our community. Fees provide the resources for SVCF to operate efficiently and effectively, ensuring due diligence in our grant processing, donor and nonprofit education, research and other activities. Annual fees are assessed monthly based on average fund balance.

Corporate advised fund fees fall into three categories: basic, plus and premium. Based on the services selected, fees are established by SVCF in consultation with the corporate fund advisor when the fund is created. Fees may be reviewed and, if necessary, adjusted annually to ensure that fees remain equitable based on the services provided by SVCF. (A variety of factors determine whether a fund is considered basic, plus or premium, such as grantmaking volume, strategic services and staff time requirements.)

Fees	Basic	Plus	Premium
On the first \$5 million	1.50%	2.00%	2.25%
On amounts over \$5 million	0.75%	1.25%	1.50%
On amounts over \$10 million	0.50%	1.00%	1.25%
On amounts over \$15 million	0.25%	0.75%	1.00%
Minimum annual fee	\$500	\$4,500	\$10,000

Other Fees

Investment expenses are in addition to the administrative support fee charged by SVCF. SVCF will charge a one-time fee of \$15,000 for corporate advised funds created with less than \$1 million. Other fees may apply under special circumstances.

Contact Silicon Valley Community Foundation at donate@siliconvalleycf.org or call 650.450.5444 for additional information.

*Additional fees may apply for these types of gift transactions.