



DONOR-ADVISED FUND FEE SCHEDULE

Investment Program:

Below is the fee schedule for Donor-advised Funds (DAFs) who participate in the investment program at United Charitable. United Charitable partners with independent investment managers at the donors' request to invest the funds donated inside their DAF. The costs associated with these professionals may vary, and are charged independently of United Charitable's 1% annual fee.

Please note: To be invested in the market, a minimum of **\$25,000** is required. Fees are charges bi-annually based on 12/31 and 6/30 fund balance.

Fund Balance	Investment Management Fee
\$25,000 to \$500,000	1%
\$500,001 to \$1,500,000	0.85%
\$1,500,001 to \$3,000,000	0.6%
Above \$3,000,000	0.45%

For more information about investing United Charitable DAF funds, please contact Julia Healey, Financial Director at 571-620-3003 or email her at julia@unitedcharitable.org.

Cash Program:

\$250 Annual Administrative Fee for funds not invested in the market.

A 1% fee is assessed on all incoming cash donations [only].

Additional fees that may apply:

3% fee for all credit card transactions.

2% fee for \$75 [whichever is greater] for closing a United Charitable DAF.

\$15 fee on transactions that require expedited processing.

\$25 fee for domestic bank wires, erroneous or returned contributions.

\$35 fee for incoming checks issued from banks outside of the United States.

\$50 fee to wire funds to banks outside of the United States.

Additional mail fees for USPS priority mail, registered mail, or any other form of special delivery.

Other fees may apply. All fees are subject to change without advance notice. Please contact us at 571-620-3000 with any questions. Thank you.