

Endowed Giving

For more than 20 years, WCF has partnered with donors to establish permanently endowed philanthropic funds that serve our community now and forever.

Trusted Advisor

Donors contribute \$2 million to \$3 million in new assets annually to current and newly established philanthropic funds

Effective Grantmaking

Each year, WCF grants more than \$2 million dollars locally and nationally.

Community Leadership

WCF convenes community, donors, nonprofits, civic leaders and fellow grantmakers to address key issues in our coastal communities.

Giving Options

Waccamaw Community Foundation offers our donors the following giving options:

- Donor-Advised Funds (non-endowed, partially-endowed and fully-endowed options)
- Scholarship Funds
- Designated Funds
- Organizational Endowments
- Field-of-Interest Funds (Issue Area and Geographic Focus)
- Legacy Funds
- Community Partnership Fund

Investment Options

Short-Term Portfolio – Investment in cash instruments for maximum liquidity. This pool is used exclusively with non-endowed funds.

Traditional Portfolio – This portfolio has a 5-year performance target of 7.5%.

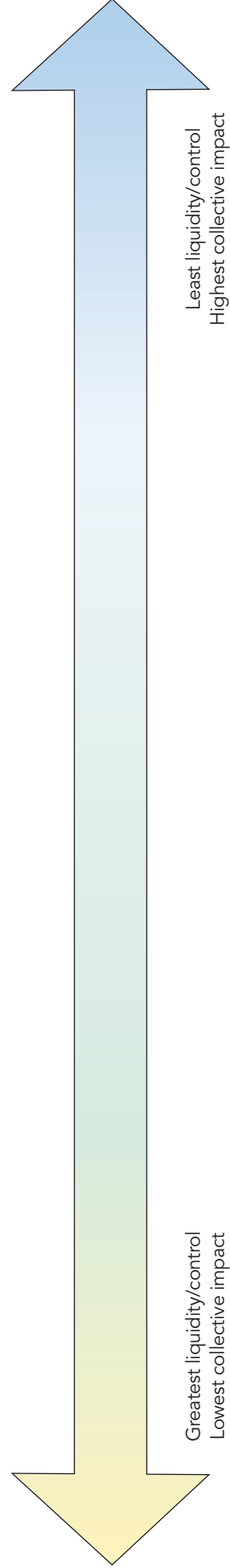
ESG Portfolio – This portfolio has a mandate to invest in socially responsible investment opportunities while maximizing return.

Place-Based Impact Investments (PBII) – Our PBII portfolio invests in local projects that provide a market return and social benefit to our community. Because these investments focus on maximizing the use of investment capital in our communities, it offers a reduced spendable rate for fund holders.

Type of Fund	Fees	Minimums	Investment Options
Fully-Endowed Funds	\$250 Minimum 1.5%: Up to \$1 million 1%: \$1 million to \$5 million .75%: \$5 million +	All fund types have a starting minimum balance of \$25,000	Traditional Portfolio for all. ESG and PBII are available for funds \$500,000 and greater
Partially-Endowed Funds	\$500 Minimum 2%: Up to \$1 million 1.5%: \$1 million to \$5 million 1%: \$5 million +	Have a starting minimum balance of \$25,000	Traditional Portfolio
Non-Endowed Funds	\$500 Minimum 3%	Available to Donor-Advised	Short-Term Portfolio



Investment Highlights	Short-Term	Traditional		ESG	Place-Based Impact Investing
Fund Type	Non-Endowed	Partially-Endowed	Fully-Endowed	Fully-Endowed >\$500,000	Fully-Endowed >\$500,000
Who is this for?	Full access to funds, little concern for investment return	Concerned with highest possible return for long-term philanthropy		Highest return, with socially responsible investing constraints	Philanthropic dollars to be used for local investing under community leadership
Investment Objective	0 - 2%	7.5% average over 5 years		6% average over 5 years	4 - 5% over 5 years
Spendable	Fund balance	Excess of balance over \$25,000	4% of previous 20 quarters	3% of previous 20 quarters	N/A



Waccamaw Community Foundation builds sustainable philanthropy by connecting donors with causes they care about to strengthen our communities.