

Giving Options and Services

Fiduciary Excellence

CCF manages more than \$280 million in philanthropic capital to support our nine-county service area along South Carolina's coast.

Trusted Advisor

Donors contribute more than \$20 million in new assets annually to current and newly established philanthropic funds.

Philanthropic Investor

CCF grants \$18 million to \$20 million dollars annually locally and nationally.

Community Leadership

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

Giving Options

Coastal 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
- IMPACT Management Endowment

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%: Up to \$1 million .75%: \$1 million to \$5 million .5%: \$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 1.5%: Up to \$1 million 1%: \$1 million to \$5 million .65%: \$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 |

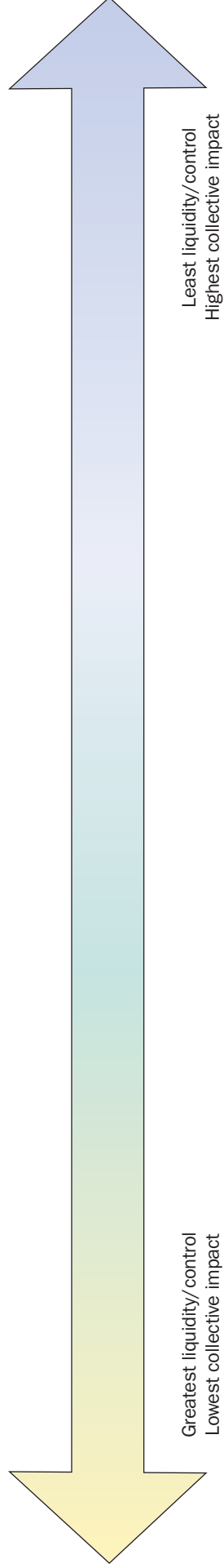
Coastal Community Foundation helps create vibrant communities by uniting people and investing resources.



Coastal
Community
Foundation
OF SOUTH CAROLINA

Giving Options and Services

| Investment Highlights | Short-term | Traditional | | ESG | Place-based Impact Investing |
|-----------------------------|--|---|----------------------------|---|---|
| Fund Type | Non-ended | Partially-ended | Fully Ended | Fully-ended >\$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 | 4% of previous 20 quarters | N/A |



Coastal Community Foundation helps create vibrant communities by uniting people and investing resources.