



THE COMMUNITY FOUNDATION
of Shelby County

Build Today...Dream for Tomorrow

Spending Policy Amounts

The Spending Policy is based upon the value of an endowed charitable fund for the past 16 quarters. We average the market value of each charitable fund and multiply its average by the spending percentages shown below.

The board may choose to raise or lower the spending amount each year, depending upon factors such as market volatility, return and general economic stability. The goal within each investment pool is to enable the charitable fund to keep pace with inflation and to increase disbursements as charitable fund market values grow over time.

	Conservative Pool	Balanced Pool	Growth Pool
Average Fund Balance	3%	3.50%	4.00%
\$25,000	\$750	\$875	\$1,000
\$35,000	\$1,050	\$1,225	\$1,400
\$50,000	\$1,500	\$1,750	\$2,000
\$75,000	\$2,250	\$2,625	\$3,000
\$100,000	\$3,000	\$3,500	\$4,000
\$125,000	\$3,750	\$4,375	\$5,000
\$150,000	\$4,500	\$5,250	\$6,000
\$200,000	\$6,000	\$7,000	\$8,000
\$250,000	\$7,500	\$8,750	\$10,000
\$300,000	\$9,000	\$10,500	\$12,000
\$350,000	\$10,500	\$12,250	\$14,000
\$400,000	\$12,000	\$14,000	\$16,000
\$450,000	\$13,500	\$15,750	\$18,000
\$500,000	\$15,000	\$17,500	\$20,000
\$750,000	\$22,500	\$26,250	\$30,000
\$1,000,000	\$30,000	\$35,000	\$40,000
\$1,250,000	\$37,500	\$43,750	\$50,000
\$1,500,000	\$45,000	\$52,500	\$60,000
\$2,000,000	\$60,000	\$70,000	\$80,000
\$3,000,000	\$90,000	\$105,000	\$120,000
\$4,000,000	\$120,000	\$140,000	\$160,000
\$5,000,000	\$150,000	\$175,000	\$200,000

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