

FOUNDATION FOR OCPS | ADMINISTRATIVE FEES

Standard Funds

As of July 1, 2017, for any school or district department fund, the Foundation will charge a quarterly 2.5% administrative fee on total deposits made to the Foundation for that fund, with a minimum charge of \$250 per year.

In addition to the standard administrative fee, gifts received by credit card incur a 3.5% one-time fee to offset costs charged to FOCPS for such gifts.

Gifts received through PayPal incur up to a 3.2% one-time fee (in addition to the standard 2.5%), to offset charges for such gifts.

Investment Accounts

Schools, district departments, and donors may decide to establish investment accounts that can provide long-term or legacy support, such as scholarships or endowments. These accounts will be subject to the following charges, based on the fund's total value:

Funds up to \$249,999:	2.25%
Funds of \$250,000-\$499,999:	2.00%
Funds of \$500,000-\$999,999:	1.75%
Funds of \$1 million and up:	1.50%

These amounts *include* a discounted 1% fee charged by our financial advisors, NBC Securities.