FUNDS FOR INDIVIDUALS

Named Funds

BERKSHIRE COMMUNITY FOUNDATION
Local Giving. Lasting Impact.

A Named Fund is a ring-fenced charitable fund held and managed by Berkshire Community Foundation (BCF) on your behalf. It is a great way to get directly involved in community philanthropy, with all the benefits (including tax breaks) but without the cost, time and administration of having your own charitable trust.



It can be in your own or your family's name; it could be in honour of someone's memory; or it could be named for your business or organisation.

You have full autonomy to support the causes and charities you care about the most, with control over the criteria and (if you wish) all grants made. We take care of all the legal responsibilities, due diligence and administrative processes for you, and share regular updates on your Fund's activities.

How a Named Fund works

There are two main types of Named Funds: **'Endowment Funds'** which are invested for long-term giving, and **'Immediate Impact Funds'** which are used for immediate grant-making.

While Immediate Impact Funds enable you to create significant impact in the here and now, Endowment Funds help you to create a long-lasting legacy within local communities, with the value of grants awarded exceeding the original donation over time while retaining its invested value. You may choose to set up a **'Combination Fund'** with a proportion of your donation being invested for long-term growth, whilst a percentage is used for immediate distribution.

What you receive from BCF as a Named Fund holder

A tailored philanthropic programme

Bespoke advice based on your charitable interests, grant-making programmes that ensure your donation makes a real difference to the causes you care about, and alerting you to match-funding opportunities to maximise positive impact.

Comprehensive and transparent grant-making and reporting

From sourcing and assessing funding requests and carrying out due diligence on grant applicants, through to monitoring and reporting on the impact of your grants.

Opportunities to visit charities and groups

See your funding in action.

Access to local and international networks

Of like-minded philanthropic individuals or businesses.

For more information or to register your interest, please contact philanthropy@berkshirecf.org.

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