



Annual Investment Income Allocation (Buckets)



Current Year Grants

Based on net income of a fund from prior year. Current target is 4% granting each year.



Grant Stabilization

Grant Stabilization represents a hold back in good years to ensure consistent granting in lean years. Currently targeting two years of grants.



Inflation Protection

To ensure purchasing power of donations is maintained in perpetuity. CPI rate for a year used to calculate required balance.



Additional Granting Money

If excess earnings are available with first three buckets filled, there is an opportunity to supplement current year grants with excess funds.

Note: In the initial year that your fund is established, investment income is allocated to grant stabilization first and current year grants second. This means that your fund is unlikely to have granting dollars available until the second calendar year after the fund has been established. To guarantee granting in the year following the establishment of your fund, you'll need to direct a donation to your fund which is earmarked for flow-through granting.