



Stewardship Fee Policy

- Endowed accounts will be subject to an annual fee of 2% calculated based on the rolling prior four quarterly averages of each fund's market value as of June 30 and applied on July 1.
- A fee is charged for acceptance, sale and/or management of real property.
- Direct and indirect costs for foundation services will be deducted from Special Campaign gifts. (Glossary of said gifts can be found in the Board of Governors Procedure Manual).
- A one-time stewardship fee of 5% will be assessed on all gifts.
- The Saddleback College Foundation Finance Committee retains the right to adjust fees.