Invested funds – giving to grow

As a charity, we rely on the generosity of our donors not only to fund the causes they care about, but also to make our work possible. By setting up an invested fund, the aim is for your fund to grow over time, helping to sustain communities, initiatives and organisations for years to come.

Annually, we retain a percentage of your fund value to support our costs, including staff and the systems and resources we use to distribute funding across Scotland. We call this our 'contribution'.

The contribution is based on the value of the sum invested, and on how you choose to distribute grants. Below are the options for giving and associated contributions:

Fund Type	Description	Annual contribution to core costs
Growth	Designed to grow over an agreed period, with no funds drawn down during the growth phase	0.5%
Donor Advised – single organisation fund	Funds are drawn down to a grantmaking fund, from which a grant is made to the same organisation* annually	0.5%
Donor Advised	Funds are drawn down to a grantmaking fund, from which grants are made to multiple organisations*	Under £1,000,000: 1% Over £1,000,000 : 0.5%

*refers to any body that provides public benefit in Scotland, which could mean, for example, a registered charity, a Community Interest Company a community group