TIERING CRITERIA

INDIVIDUAL STATUS

VIP
- History of philanthropic giving
- Owner of major local business
- Retired from upper management of major business
- High profile civic and/or community leader
- Involved/retired leader from major local nonprofit
- High potential for, or made additional gifts to CICF
- Beneficiary of wealth transfer
- Has a private foundation
- Introduces/includes PA in discussions with CF
- Makes referrals to CF

FUND TIERING CRITERIA

1. Size of donor-advised fund
   - Market value - $XXX - $XXXX
   - Market value - $XXXX - $XXXXX
   - Market value - $XXXXX - $.........

2. Gift frequency to CF
   - Initial gift only
   - Annual gift
   - 2-3 gifts annually
   - More than 3 gifts per year

3. Deferred gift to benefit fund and/or CF
   Yes

4. Funds with CF
   - More than one fund established
   - Endowment
   - Future Gift

5. Grantmaking in past 3 years
   - Suggests grants at least every year
   - Cumulative amount
     - $XXXX - $XXX
     - $XXXX - $XXXXX
     - $XXXXX - $.........

6. Fund Advisor Engagement with CICF
   - Attends at least one event every 1-3 years
   - Participates in co-investment or proposal referrals
   - Seeks assistance with grantmaking, strategic charitable planning and/or family philanthropy
   - CF volunteer