



Fund Guidelines and Fee Structure

Background

The Institute for Science and Health is pleased to offer the opportunity for individuals, families, or other entities to establish a Fund within the Institute for the purpose of supporting health-science research. Funds are generally established for a particular cause (disease or condition) that is synergistic with the mission of the Institute and shall remain as such in perpetuity. Funds are generally named for the disease or condition of interest with some flexibility. All Fund assets are dedicated to the Research Program Initiative most closely related to the cause.

Commitment

In order for such synergy to be effective and achieve the goals for the betterment of human health, the Institute requires that all incoming assets be designated for Institute managed research programs and related activities through the appropriate Research Program Initiative.

Operations Fee Structure

The Fund Operations Fee represents fees charged for management of research programs associated with Institute Research Program Initiatives that are supported by the Fund assets. These fees are vital for the implementation and continued performance of the research process as part of the Institute's proprietary Rubicon model.

The Operations Fee is determined relative to the resources made available to the Institute Research Program Initiatives according to the following schedule.

Resources made Available*	Operations Fee
\$500,000 or less	10% (of total) [†]
Above \$500,000	10% or less [‡]

* Represents the average total amount of financial resources available during one fiscal year.

† Fees are deducted from the total resources made available for research grants. The remaining assets are applied to appropriate research project(s).

For example –

\$500,000	designated for the Degenerative Eye Diseases Program Initiative
<u>- \$50,000</u>	Operations Fees applied
\$450,000	available for outgoing grants to independent research investigators

† Determination of actual Operations Fee assessed will be based on negotiations between the Fund principals and Institute's Financial Advisory Council and relevant staff.