

Linking Good People with Good Causes



Giftfunds
Canada



Gift Funds Canada – helping
you systemize and simplify
your charitable giving

GIVING...it's the very essence of our humanity. A deeply personal expression of one's beliefs and life experiences.

Whether you want to help advance **life-saving medical research**, **support the arts**, **encourage educational efforts**, **sustain environmental initiatives** or **just help people in need**, your charitable giving can have a real and lasting impact in your community or on the world at large.

If you have been considering how to create a lasting legacy and perhaps bring your family closer together through philanthropic giving...we invite you to consider the charitable gift fund program offered by **Gift Funds Canada** – the Charitable Gift Funds Canada Foundation.

Gift Funds Canada is a public charitable foundation that provides simple, efficient & tax-effective options to help you realize your philanthropic goals meaningfully and effectively while maximizing your grant-making flexibility. You can work closely with your trusted advisor or Gift Funds Canada directly, to help ensure your gifts complement your overall wealth management strategy and support the charitable causes you favour in ways that are effective and enduring.

A **charitable gift fund (CGF)** is a charitable giving vehicle created for the purpose of managing charitable donations on behalf of an individual, family or organization. Also known generically as a "donor-advised" fund, a CGF offers the opportunity to create an easy-to-establish, low cost, flexible instrument for charitable giving, tailored to the philanthropic goals and values of its founding donors.

You enjoy all the financial advantages and the personal satisfaction that comes with establishing your own private foundation, but without the cost and complexity.

With a Charitable Gift Fund, Gift Funds Canada allows you to focus on the pleasures of giving.

Classic Charitable Gift Fund

Fund Type	Description/Objective	Source of Funds Available for Grant-Making	Investment Policy	Initial Gift
Classic CGF	An endowed fund to satisfy long term philanthropic objectives. The intention is to preserve gift capital for a minimum of ten years while providing a steady, annual stream of grant money for disbursement.	The Classic fund will provide money for grant-making that is calculated annually and funded from the accumulated net investment income PLUS any portion of gifts designated by the donor as “available for grant-making.”	Conservative, long-term growth	\$25,000 (minimum)

Flex Charitable Gift Fund

Fund Type	Description/Objective	Source of Funds Available for Grant-Making	Investment Policy	Initial Gift
Flex CGF	A current fund with unlimited grant-making privileges designed to satisfy short to medium term philanthropic objectives.	Gift capital and accumulated net investment income may be disbursed on the recommendation of the donor/grant advisor.	Fund assets will be invested in a way that is consistent with the donor's philanthropic objectives as described in the original charitable gift fund agreement that may be updated if the objectives change.	\$100,000 (minimum)

How does it work? You make an irrevocable contribution (minimum \$25,000) to the Charitable Gift Funds Canada Foundation to create a charitable gift fund.

You may then recommend an investment strategy from among approved, prudent investment options or, where appropriate, develop a custom designed plan to match your philanthropic objectives. Gift Funds Canada invests your contribution through your investment advisor, financial service provider, wealth management firm or an appropriate investment pool. In many cases, the charitable gift fund becomes a family legacy that carries on for generations.

When you're ready, you make grant recommendations to support your preferred charitable organizations. Gift Funds Canada promotes grants to the widest possible variety of charities across Canada as long as these organizations are recognized as "qualified donees" by the Canada Revenue Agency (CRA).

When a charitable gift fund is established with Gift Funds Canada, a donor:

- **Receives a donation receipt for the full value of all eligible contributions made**
- **Recommends an investment strategy for their Charitable Gift Fund**
- **Recommends grants from the fund to charities of their choice and on their own timetable**
- **Turns over all administrative paperwork to the Foundation.**

Gift Funds Canada works with donors and their wealth management, legal and/or financial advisors to balance their philanthropic goals with their estate planning and other financial planning needs.

*Registered with CRA as the Charitable Gift Funds Canada Foundation -
Charitable Registration # 89671 3500 RR0001*



If you would like to learn more about how Gift Funds Canada can help, speak with your investment advisor or contact us directly at contactus@cgfc.ca or 1-866-712-5988



*"Give generously but not
indiscriminately. Select carefully
those worthy to receive your gifts."
Lucius Anneaus Seneca (4 BC)*

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For further assistance, please contact
your Investment Advisor, call the Foundation
Office at **1.866.712.5988** or
visit us online at www.charitablegiftfunds.ca

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