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A simple, powerful, and highly personal approach to giving

Donor Advised Fund



Opening a Donor Advised Fund *allows you to make a gift to your community foundation, then remain actively involved in suggesting uses for your gift.*

Here's how it works:

- You make a gift to your community foundation — you can give cash, appreciated stocks, real estate, or other assets.
- We set up a special fund in your name, in the name of your family or business, or in honour of any person or organization you choose.
- You receive tax benefits the year your gift is made.
- You recommend uses for your fund — working with our local grantmaking experts to support the agencies and programs you care about most.
- Your recommendations are presented to our community foundation board for approval.
- We handle all the administrative details and issue grants to charities in the name of your fund (if you prefer, your grants can be made anonymously).
- If you wish, your gift can be placed in an endowed fund that is carefully invested and can grow over time; a portion of your fund is then used to address community needs every year.

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The gift of giving.

Anne Hohenadel loved giving gifts. "She gave far more than she ever received," says her daughter, Pauline. "She also taught me the true joy of giving."

So when her mom passed away, Pauline marked that first Christmas by starting a Donor Advised Fund in her mother's name through her local community foundation.

The Anne Hohenadel Fund supports her mom's favourite charities, year after year. "Please don't think I must be one of the rich and famous to be able to do this," says Pauline. "Not so. I'm just an ordinary citizen who wants to honour an extraordinary one."

Ten reasons

people choose to give through community foundations:

one We are a **local organization** with deep roots in the community

two Our staff and volunteers have **broad expertise** regarding community issues and needs

three We provide highly **personalized service** tailored to each individual s charitable and financial interests

four Our funds help people **invest in the causes** they care about most

five We accept a wide **variety of assets,** and can facilitate even the most complex forms of giving

six We partner with **professional advisors** to create highly effective approaches to charitable giving

seven We offer maximum **tax advantage** for most gifts under federal law

eight We **multiply the impact** of gift dollars by pooling them with other gifts and grants

nine We build **endowment funds** that benefit the community forever and help create personal legacies

ten We are a **community leader,** fostering collaboration on issues of broad interest to create positive change.

"Community foundations are a local resource that enables people to be charitable in a very personal and meaningful way."

JILL MCALPINE, FCA
CHARTERED ACCOUNTANT

Why create a Donor Advised Fund?

It provides a convenient and flexible tool for individuals, families, businesses, or groups who want to be personally involved in their giving. People with a range of community interests find that it's an ideal vehicle for fulfilling their charitable wishes. Donor Advised Funds are typically less costly and easier to administer than other forms of philanthropic giving (such as family or corporate foundations).

Plus, a Donor Advised Fund includes these benefits:

- You can establish a charitable legacy in your name, in the name of your family, or in honour of any individual or organization you select.
- You can coordinate all of your giving through one fund, supporting your favourite charities now and for years to come.
- You know that your gift will be carefully invested and managed via our proven stewardship practices.
- Your gift can generate the long-term advantages of endowment funding — principal from your gift can be invested, not spent; investment income is then used to make annual grants to nonprofit agencies and programs.
- You can turn to our local grantmaking experts for advice on community priorities and local organizations that are making a difference
- You are eligible to receive maximum tax benefits; you can also add to your fund at any time and receive tax benefits with each new gift.
- You can establish a fund today, and make grant recommendations now or in the future.

There's so much more we'd like you to know. *Your community foundation provides personalized service and a variety of giving vehicles. We welcome the opportunity to work with you and your advisor to fulfill your unique charitable objectives.*