

MAKE YOUR CHARITABLE IMPACT

Be part of building a healthy and vibrant community where everyone belongs.

Calgary Foundation makes it easy for you to give to initiatives close to your heart and offers a variety of purposeful and flexible giving options.

Individuals, families and organizations can establish a Fund at Calgary Foundation, make one or multiple donations, and grant to charitable organizations of their choice from the Fund.

Whether you wish to invest your gift, give to many charities over the next few years, or are updating your Will and wish to make a future gift, Calgary Foundation has a charitable giving option for you.

Support the charities you care about, now or forever.



**CALGARY
FOUNDATION**
FOR COMMUNITY, FOREVER



CALGARY FOUNDATION

Calgary Foundation inspires philanthropy, supports the charitable sector and builds a permanent endowment to address the current and future needs of people in our community. [Learn more](#) about us on our website.

TABLE OF CONTENTS

Fund Types	2
Granting Preference	2
Ways to Give	3
Governance and Investment Strategy	3
Fund Terms	4
The Endowment	5
Cost Recovery	6
Distribution	6
Fund Advisors	6
Donor Recognition	6
Establish a Fund	7

DONOR SUPPORT

Our Donor Relations team is here to support and inform your philanthropic journey. Whether this is your first venture into philanthropy, or you are a seasoned philanthropist, our team is here to support you.

Upon the creation of a Fund, a designated Foundation staff member will become your primary relationship contact, **your designated Donor Steward**, to support you with all facets of granting and to help you achieve your charitable goals.

We have **extensive community knowledge** to share; and if it's not at our fingertips, we'll find it for you. Our public online **Community Knowledge Centre** is a searchable online resource that showcases charitable organizations working on innovative solutions to our city's most pressing issues.

FUND TYPES

Living Giving Fund

Fund is active during the Donor's lifetime

Future Fund

Donor establishes a Fund during their lifetime that is activated through a testamentary gift in their Will, Life Insurance, RRSP or TFSA

Memorial Fund

Donor creates a Fund to receive donations from friends and family in memory of a loved one

Student Award Fund

Donor can support students at educational institutions

GRANTING PREFERENCE

HANDS OFF

Grants are distributed automatically by Calgary Foundation each year

Named Fund in the Community Fund

Granting decisions are made by Calgary Foundation based on the needs of the community

Field of Interest Fund

Grants are restricted within an interest area specified by donor

Donor Designated Fund

Donor selects recipient organizations who receive grants each year

HANDS ON

Donor Advised Fund

Donor actively recommends grants to charities



WAYS TO GIVE

DONATING TO A FUND

Calgary Foundation does not fundraise and will not ask for additional contributions. Anyone can make a charitable donation to a Fund at any time upon the Fund's establishment.

- **Credit card:** Go to [our donation website](#), then search and select the Fund name
- **Cheque:** Payable to Calgary Foundation, note Fund name in memo line
- **Gift of Securities or wire transfer:** For instructions email donations@calgaryfoundation.org

Charitable tax receipts will be issued for all eligible donations.

GOVERNANCE AND INVESTMENT STRATEGY

Learn more at calgaryfoundation.org about Calgary Foundation's [Governance](#) and browse our [Annual Reports](#)

Read Calgary Foundation's [Investment Overview](#) and find

- Statement of Investment Policy
- Latest Endowment Portfolio Performance Report
- Past performance and current Investment Managers





FUND TERMS - FOREVER ENDOWED, TERM ENDOWED OR FLOW THROUGH

Forever Endowed Fund

Term: Perpetual

Minimum to Begin Granting: \$10,000 - \$25,000

Grant Amount per year: Percentage of the market value of the Fund as per CRA's Disbursement Quota and Calgary Foundation's Board approved rate of distribution, currently 5%.

A Forever Endowed Fund is a gift that keeps on giving. Your charitable gift is invested in the endowment portfolio, and the initial gift and community impact both continue to grow over time.

Contributing to an endowment Fund at Calgary Foundation is a beneficial way to create a lasting legacy that ensures the causes you most care about receive your support, forever.

Term Endowed Fund

Term: 3-10 years

Entry Point: \$100,000

Grant Amount per year: Percentage of the market value of the Fund as per CRA's Disbursement Quota and Calgary Foundation's Board approved rate of distribution, currently 5%.

This is a flexible option for donors who wish to endow for a specified period, then spend down.

Timeline:

Years 0-3: Fund is invested and will grant percentage of the market value of the Fund.

Years 4-10: the Fund

- can begin to spend down over a specified time period, while the balance remains invested
- can be partially or wholly transferred to a flow through or forever endowed Fund at any time.

Year 10: Decision is made by Fund Founder to

- invest for one additional term
- distribute fund balance to charities
- endow forever

Flow Through Fund

Term: 0-3 years

Entry point: \$10,000 (Memorial Funds \$0)

Grant Amount per year: Total Fund balance

Opportunity for greater short term or immediate community impact. Grants can be made (over \$250) at any time.

A Flow Through Fund may be used to:

- Donate assets now and support multiple charities over the next few years
- Donate a gift of securities and grant to a charity unable to accept this type of gift
- Provide donor anonymity
- Establish a Memorial Fund

Flow Through Funds do not participate in the primary endowment investment portfolio.

THE ENDOWMENT

- Calgary Foundation’s pooled asset is made up of donor contributions and investment returns
- Its purpose is to plan for future needs we cannot yet see or even imagine
- Total assets of \$1.3B means donors granted \$61.4M to charities last year
- Fund Founders choose if and when to endow (invest) and for how long

POWER OF ENDOWMENT

Both Fund balance and granting power of forever endowed Funds can continue to grow over time in perpetuity, without additional contributions to the Fund.

PROJECTED GROWTH OF A \$10,000 ENDOWED FUND



Projections based on assumption of annual market returns of 8.0%, 1.0% cost recovery, and 5.0% granted to community.

PROJECTED GROWTH OF A \$100,000 ENDOWED FUND



Projections based on assumption of annual market returns of 8.0%, 1.0% cost recovery, and 5.0% granted to community.

Try the [Power of Endowment Calculator](#) on our website.

COST RECOVERY

Flow Through Funds: 1% of the total gift amount up to and including \$1 million

Forever Endowed Funds: 1.25% up to \$1 million

Term Endowed Funds: 1.5% up to \$1 million

View our [full cost recovery](#) information.

DISTRIBUTING GRANTS TO CHARITIES

Grants can be made from a Fund to any qualified donee as per Canada Revenue Agency.

Grant recommendations can be submitted to us any time of year. Grants to charities are disbursed twice per month.

Endowed Funds are eligible to grant one year after establishment.

FUND ADVISORS

- Family members and up to two future generations can be named as Fund Advisors to recommend grants
- Fund Founder can add or remove Fund Advisors at any time

DONOR RECOGNITION

- Fund name is chosen by Fund Founder
- Fund name can be shared with grant recipient organizations
- Fund name, balance, grant recipients, and grant amounts can be published in Calgary Foundation's Annual Reports

COMPARING YOUR OPTIONS

[Donor Advised Funds vs. Private Foundations](#)

ESTABLISHING A FUND IS SIMPLE!

Connect with our team!

Email donations@calgaryfoundation.org to start your charitable journey with Calgary Foundation.

Be in the know

Visit our [Stay Connected page](#) to receive your choice of Calgary Foundation communications.

Professional Advisors

Please [sign up](#) to receive our Advisor Communications and become part of our network.

