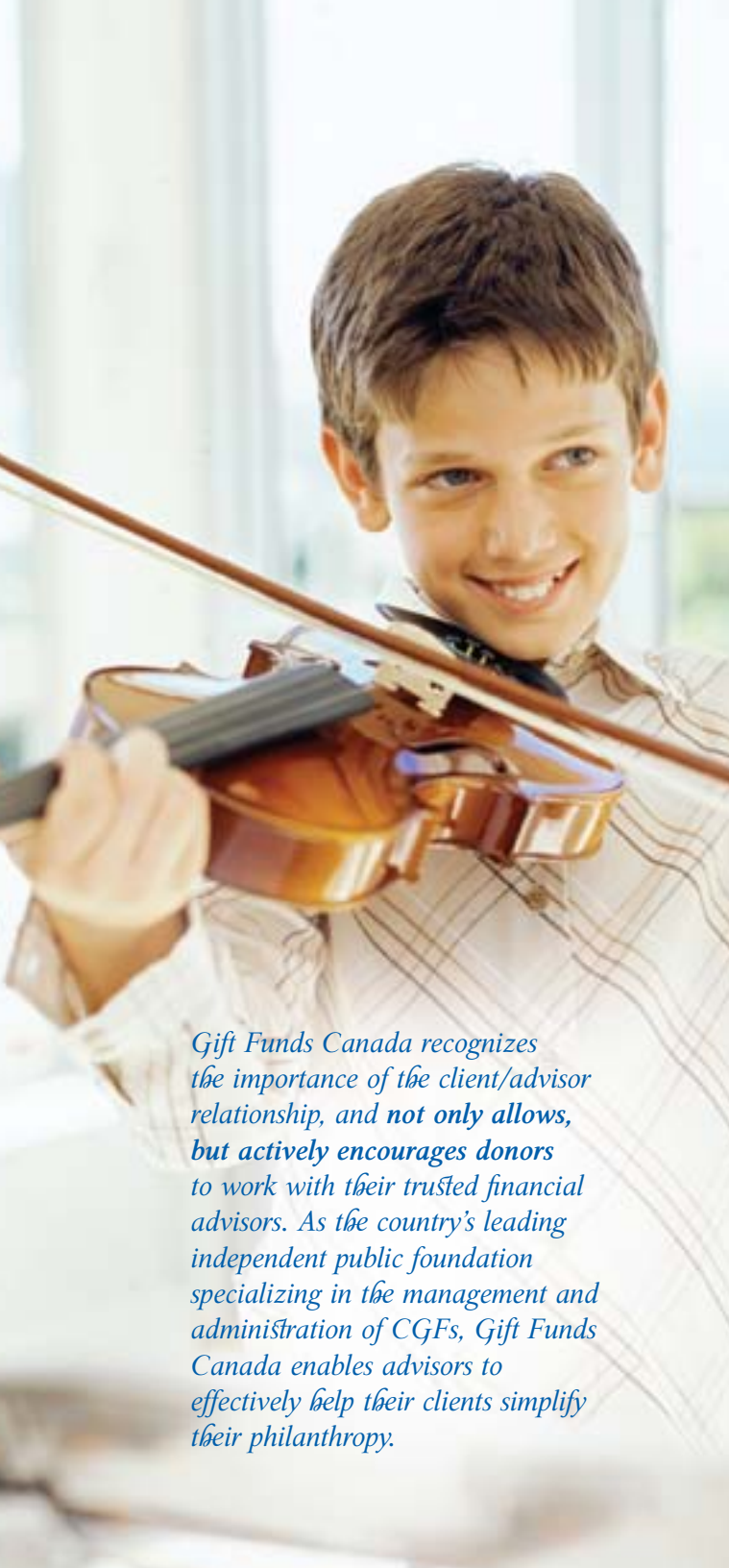


Charitable Gift Funds An Overview for Advisors



Giftfunds
Canada



Gift Funds Canada recognizes the importance of the client/advisor relationship, and not only allows, but actively encourages donors to work with their trusted financial advisors. As the country's leading independent public foundation specializing in the management and administration of CGFs, Gift Funds Canada enables advisors to effectively help their clients simplify their philanthropy.

More than ever, high net worth individuals are looking to their trusted advisors for direction regarding their charitable giving. If you're an investment advisor who'd like to offer your clients a charitable gift planning solution where you stay involved on the investment side of these activities, we invite you to consider the charitable gift fund program offered by *Gift Funds Canada* – the Charitable Gift Funds Canada Foundation.

The opportunity to help your clients while enhancing your practice has never been more attractive.

In addition to entering prime giving years, many of your clients are facing wealth preservation and transfer issues. They may be asking themselves questions that are difficult to answer, such as:

“How can we prepare our heirs so that wealth is a force of good in their lives...and not a burden?”

“How can we share our good fortune with causes important to us, now and beyond our lifetimes?”

“Is there a tax-wise way to establish a family foundation without creating unwelcome public scrutiny and an administrative nightmare?”

In response to such inquiries, shouldn't YOU have an easy-to-use gift planning solution to offer your clients?

About Charitable Gift Funds

A *charitable gift fund (CGF)* is a giving vehicle created by an individual, family or organization for the purpose of managing charitable giving activity – today, tomorrow and, if desired... forever. CGFs are easy-to-establish, low cost, flexible instruments for charitable giving. They are often established as an alternative to direct giving and/or creating a private foundation. Donors enjoy administrative convenience, cost savings and tax advantages by conducting their grant-making through the fund.

Charitable Gift Fund Program Features

We offer you...

- An independent platform for greater investment flexibility - for clients who might want or need more sophisticated investment solutions,
- An independent advisory service – we serve as members of your professional team -- we do not market directly to your clients,
- An ability to accept a wide array of illiquid assets, for example; restricted stock, closely held stock, real estate, etc.
- The flexibility to customize a philanthropic solution to meet the needs of most high-net-worth individuals and families,
- An established reputation for quality service and integrity in all aspects of our service.

We offer your clients...

- The opportunity to leave a lasting charitable legacy as an example for future generations to follow,
- The right to name successors, including children, to provide future guidance on the fund,
- Grants may be recommended for disbursement:
 - In the name of the fund
 - In the name of the donor(s)
 - With “full” or “partial” anonymity

How a Charitable Gift Fund Works

To establish a new fund, your clients would contribute cash, appreciated securities or other assets in exchange for immediate donation receipts, significant tax credits (and/or tax deductions, where applicable). As fund holders, they would enjoy the following advisory rights:

- *Right to name the fund,*
- *Right to retain you as an investment advisor for the fund,*
- *Right to recommend investment solutions, and*
- *Right to recommend charitable grants to favoured charities.*

Grants may be recommended at any time, funded from net investment earnings and/or original gift capital, consistent with the donor's giving goals and timetable. Best of all, Gift Funds Canada assumes all back office tasks – including asset liquidation, compliance monitoring, CRA filings and grant disbursement responsibilities.

Intrigued?

We're here to help. Give us a call at 1.866.712.5988 or visit us online at www.charitablegiftfunds.ca

Enhance your practice with Gift Funds Canada – helping you help your clients simplify their philanthropy. Now that's good advice.

Linking good
people

Giftfunds
Canada

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with
good causes