



Windsor Essex
 Community
Foundation

DONOR ADVISED ENDOWMENT FUND PACKAGE



"Inspiring philanthropy to benefit our community today and forever."

This is our vision for our community.

With our extensive knowledge and abilities, we work to improve the quality of life for residents of Windsor-Essex County and to create and support opportunities for prosperity.

The WindsorEssex Community Foundation (WECF), originally founded as Heritage Windsor, is a perpetual community trust for philanthropic purposes. It exists to manage donors' legacy funds and support local community programs. Through grant making activities, the WECF has invested over \$10.8 million in the community and has accumulated over \$24 million in assets.

In addition to this, the WECF also leads a variety of programs in Windsor-Essex County including: Inspiration 100™, Vital Signs®, and Random Act of Kindness Day™.

We build a better Windsor-Essex community by attracting and managing legacy funds, making grants to support local programs, and bringing community partners together!

This is our mission, and community members like you are vital to its success.



THE WECF IN ACTION

Random Act of Kindness Day™

A nationwide celebration of kindness promoting a 'pay it forward' movement in the community that takes place annually. For the past nine years, the WECF has brought Rak Day™ to our community, bringing the community together by engaging residents in small acts of kindness and generosity.

Vital Signs®

The WECF takes part in the Vital Signs® Program annually. A national program coordinated by Community Foundations of Canada that leverages local knowledge to measure the vitality of our communities and supports towards improving our quality of life.

Inspiration 100™

Inspiration 100™ is a group of 100 community-minded people who built an endowment within the WECF with the goal of enhancing the welfare and culture of the Windsor and Essex community by charitable giving. Members meet annually to disburse grants to local charities.

We bring donors to the table as community builders.

We help donors formulate and realize their philanthropic goals, matching their interests and concerns with community needs and organizations. We help them find innovative and responsible ways to give their investments lasting impact.

We take the broadest view of what a community is and what it needs to succeed.

This is why our community investments support everything from recreation, the arts, and the environment to shelter, sustenance and care for those most in need.

We take the long-term view for our communities.

We identify long-term needs and opportunities and invest in sustainable solutions, helping our communities become robust, resourceful, and ready for the future they want.

We work in partnership.

The WindsorEssex Community Foundation is a proud member of Community Foundations of Canada. Together, we help Canadians invest in building strong and resilient places to live, work and play.



let's make
kindness
the norm.

10 REASONS PEOPLE DONATE TO THE WECF

- 1** We are a local organization with deep roots in the community and part of a nationwide movement whose support we build and share.
- 2** We bring donors to the table as community builders, working closely with them to align their philanthropic vision with needs within our community.
- 3** We identify long-term needs and opportunities and invest in solutions that let our communities guide their own future.
- 4** We take a broad and inclusive view of what a community is and provide community investments to the widest possible range of organizations and initiatives.
- 5** We provide highly personal and flexible service, accepting a wide variety of assets and offering donors tax advantages on their investments.
- 6** We build permanent funds and those that can respond to immediate needs, helping our communities ensure vital futures.
- 7** We multiply the impact of gift dollars by pooling them with other gifts.
- 8** We believe that diversity is strength. We bring the entire community together to stimulate new ideas, build participation, and strengthen community philanthropy.
- 9** We are transparent and reputable stewards of community resources and are accountable, accessible and responsive.
- 10** We build community vitality - the unique and essential spirit that flourishes when people believe their community holds possibilities for everyone.



WECF ENDOWMENT FUNDS

How does it work?

When you create a charitable fund through WindsorEssex Community Foundation you have the opportunity to benefit the community, now and forever, with a permanent endowment. Your gift is invested over time and earnings from your fund are used to make community investments to charitable organizations that address needs in our community. Your gift, and all future earnings from your gift, is a permanent source of community capital, helping to do good work today and in the future.

Legacy and stability

Donors who endow their gifts can make a difference in their community during their lifetime and, at the same time, provide a gift that lasts forever. Community investments will continue to be made in the name of the fund you establish so that your charitable wishes are preserved.

Leaders of a charitable organization may also look to the community foundation to hold their organization's endowment because they know that having a constant source of funding helps them respond to immediate needs and plan for the future.

Expert Help

When donors or charitable organizations work through the community foundation to achieve their charitable goals, they benefit from the expertise of experienced local program staff, community leadership, and investment management.



THE POWER OF ENDOWMENTS

Charles Harvey's parents taught him about the importance of giving back and, in 1991, Charles continued that tradition. He established the Charles F.J. Harvey Family Fund at his local community foundation with an initial gift was \$15,000.

Over the years the fund grew - both through new contributions and prudent stewardship of the capital - to \$278,000. Every year his fund provides \$14,000 in community investments to youth-at-risk or isolated seniors, or to programs that allow the physically challenged to work, live and play to their full potential. Today, Charles' initial gift has been given away more than 18 times.

Mr. Harvey could have donated his entire initial gift of \$15,000 in 1991 and made a one-time investment in the community. Compare that to the benefit the community continues to realize through the endowment of his gift and in another 15, 30 or 45 years this story will still be relevant. It is not just a moment in history for Charles Harvey and his community, it is his growing legacy.

DONOR ADVISED ENDOWMENT FUNDS

Establishing a Donor Advised Endowment Fund means you can select projects and organizations that mean the most to you, operating similarly to private foundations but without the cost and administrative work for the donor.

How does it work?

- You determine how much to invest long term.
- You work with the WECF to create a fund agreement.
- The WECF handles the administrative investment details and you receive regular statements on the fund.
- You can add to the fund at any time and your donors can make unrestricted gifts to the fund. Charitable tax receipts are issued to the donor when donations are received by the WECF.
- The endowment fund is invested over time. You work with the WECF annually to distribute fund earnings towards projects and organizations that mean the most to you. Your gift, and all future earnings from your gift, is a permanent source of community capital, helping to do good work forever.



ADVANTAGES OF BUILDING AN ENDOWMENT FUND

Tax Assistance

WindsorEssex Community Foundation provides donors with maximum tax advantages.

Pooled Investments

Your endowment fund will be pooled with other funds held at the Foundation allowing for a broader spectrum of investments, protection of capital, and increased returns.

Fund Management

The WECF handles all of the administrative and investment details which allows you to focus on your philanthropic goals. Establishing an endowment fund also provides investment oversight by the WECF's Finance Committee which is made up of top investment and financial professionals.

Convenience

The WECF offers you the benefits of having your own separate fund (a "foundation within a foundation") that is simple and convenient without the customary burdens and expenses of a private foundation or trust arrangement. The WECF provides everything from grant making consultation, recordkeeping, investing, and annual reporting through an independent audit.

Flexibility

Establishing a fund allows you to address multiple interests. The WECF supports a broad base of community projects and services including: Health & Human Services; Children & Youth; Education & Literacy; Environment; Recreation & Sport; Arts, Culture & Heritage; and, Community Development.

Increased Visibility

The WECF has developed a strong reputation among community leaders and donors as one of the voices of community philanthropy. Establishing a fund with the WECF shows your commitment to a long-term sustainable mission. We are proud to actively support our fund holders and their philanthropic goals.

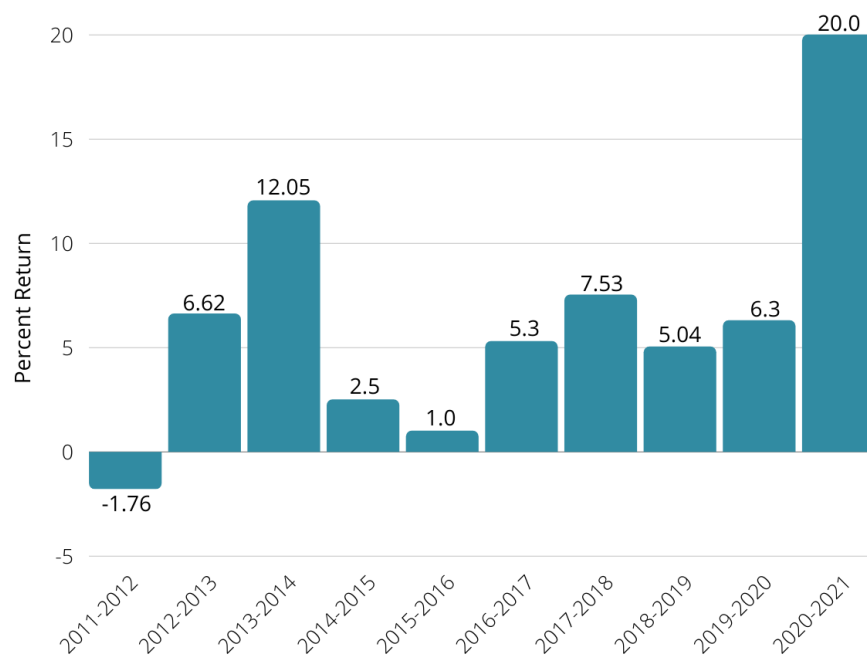
GROWTH OF AN ENDOWMENT FUND

This is an example of what your fund could look like over the next 10 years with an initial investment of \$100,000. Note that these numbers are only estimates and have been calculated based on data from previous years.

Year	Investment Earnings (6%)*	Investment & Administrative Fees (1.6%)	Granting (3.5%)	New Balance
2022				\$100,000
2023	\$6,000	\$1,600	\$3,500	\$100,900
2024	\$6,054	\$1,614	\$3,532	\$101,808
2025	\$6,108	\$1,629	\$3,563	\$102,724
2026	\$6,163	\$1,644	\$3,595	\$103,649
2027	\$6,219	\$1,658	\$3,628	\$104,582
2028	\$6,275	\$1,673	\$3,660	\$105,523
2029	\$6,331	\$1,688	\$3,693	\$106,473
2030	\$6,388	\$1,704	\$3,727	\$107,431
2031	\$6,446	\$1,719	\$3,760	\$108,398
2032	\$6,504	\$1,734	\$3,794	\$109,373
TOTAL	\$62,489	\$16,664	\$36,452	\$109,373

*Note: For both scenarios the 6% rate of return is for illustration purposes only. Returns vary from year-to-year depending on market returns and investments.

WECF ENDOWMENT FUND RATE OF RETURN OVER 10 YEARS





OUR FUND HOLDERS

From family foundations and scholarship funds, to agency funds and memorial funds, the WindsorEssex Community Foundation can help you find the right type of fund for you. With our personalized service, we will cater a fund to match your philanthropic wishes to ensure your legacy continues today and forever. The WECF is proud to be the steward for nearly 80 funds, including:

Big Brothers Big Sisters Endowment Fund
Canadian Mental Health Association Endowment Fund
WindsorEssex Nature Fund
Constable John Atkinson Memorial Scholarship Fund
Honey Family Foundation Fund
Kiwanis Music Festival Fund
Hitchcock Family Foundation Fund
Sunshine Pointe Camp Fund
Windsor Symphony Society Matching Fund
Vollmer Fund
Inspiration 100™ Endowment Fund
Facca Endowment Fund
Class Action Community Fund
Great Canadian Flag Fund
Chad Ranni Memorial Fund
Place for Life Fund
Shawn Boxe Memorial Scholarship Fund
Sharon & Gary Kelly Scholarship Fund
Cancer Research Collaboration Fund
Gale & Irene (Knister) Taylor Scholarship Fund
People First of Ontario Fund
Joe & Hazel Lacey Memorial Fund

WAYS TO GIVE

Give to the WindsorEssex Community Foundation Community Fund

When you give to the WECF Community Fund, you're helping to support our annual community investing programs. Your assistance ensures we are able to provide the broadest possible outreach of support to local charities in need. All donations made to the WECF Community Fund support projects and programs that meet select criteria and those which are either based in Windsor-Essex County or serve Windsor-Essex communities.

Give to a Specific Fund

The WECF has many different types of funds that provide support to various causes across Windsor-Essex County including children & youth, the environment, literacy, and health and human services. A complete list of current funds at the WECF can be found on our website at www.wecf.ca.

Establishing Your Own Endowment Fund

Establishing your own fund at the WECF provides you with the option to customize how you give back long-term. When you build an endowment, you're creating a legacy. You can be as involved in the process as you want while we take care of all the administrative work to make the giving process as easy as possible. You can add to your endowment at any time and receive a charitable tax receipt based on CRA guidelines. Disbursements can be made from your fund to registered charities on an annual basis.

Make a Memorial Gift

Making a memorial donation to the WECF is the best way to ensure your loved one's legacy continues. You can make gifts to any of our current funds, establish your own fund, or donate to our Vitality Legacy Program.

Flow-Through Funds

We offer a flow-through option which allows you to make your gifts to local charities through the WECF without having to worry about the administrative burden. Flow-through donations are great for people who want to remain anonymous in their giving.



Contact Us!
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