

# Gaining a higher return on your company's charitable investments

## Donor Advised Fund



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

### Here's how it works:

- Your company makes a gift to your community foundation — you can give cash, appreciated stocks, or other assets.
- We set up a special fund in your company's name.
- Your company receives tax benefits the year your gift is made.
- You (or a team of employees) can recommend uses for your fund — working with our local grantmaking experts to support the programs and agencies 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 awards 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 used to address community needs every year.

(CONTINUED ON REVERSE)

## Mountain Equipment Co-op.

Concern for the environment permeates all aspects of the operations of Canada's leading outdoor retailer, Mountain Equipment Co-op.

With 2.5 million members in 192 countries, the cooperative works constantly to reduce the ecological footprint of its operations. It also strengthens environmental organizations with charitable grants and purchases land to protect Canada's wilderness and recreational resources.

As a vehicle to achieve those goals, MEC established a donor advised fund at Vancouver Foundation in 1993 that has grown significantly over the years. MEC also partners with Vancouver Foundation and other knowledgeable

## 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

“Donor Advised Funds are the most efficient way for donors to create a legacy of charitable giving...”



### Why create a Donor Advised Fund for your business?

It provides a convenient and flexible tool for companies that want to give back to their community and stay involved in suggesting grants made possible by their fund. Companies 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 private or corporate foundations).

### Plus, a Donor Advised Fund includes these benefits:

- You can establish a charitable legacy in the name of your business.
- 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.*