



STARTING A

# DONOR-ADVISED ENDOWMENT FUND

AT THE WINDSORESSEX COMMUNITY FOUNDATION



WINDSORESSEX COMMUNITY FOUNDATION  
INSPIRING PHILANTHROPY INVESTING IN OUR COMMUNITY



## OUR VISION

Inspiring philanthropy, to benefit our community, today and forever!

## OUR MISSION

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

## OUR EXPERTISE

With decades of experience in fund management and community impact, we ensure your contribution is meaningful and your vision is honored.

# ABOUT WECF

The WindsorEssex Community Foundation (WECF) is a charitable organization dedicated to enhancing the quality of life in Windsor-Essex County through collaboration, strategic leadership, and innovative philanthropic solutions. For over 40 years, we have been committed to creating opportunities for prosperity and improving our communities.

Founded in 1983 as Heritage Windsor, WECF serves as a perpetual community trust for philanthropic purposes. We help donors establish lasting legacies that benefit our community today and into the future. To date, we have invested over \$18.9 million and managed over \$34 million in assets.

WECF leads several impactful programs in the region, including Inspiration 100™, Vital Signs®, and Random Act of Kindness Day™. By attracting and managing legacy funds, making grants to local initiatives, and fostering collaboration among community partners, we strive to build a better Windsor and Essex County. We are proud to serve our community and look forward to another 40+ years of impactful work.

# 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 simulate 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.



## 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 impacts.

## 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, education, 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, play and grow.



# WECF ENDOWMENT FUNDS

An endowment fund is more than a gift — it's a commitment to the lasting well-being of your community. When you establish a charitable fund through the WindsorEssex Community Foundation (WECF), you're building a permanent legacy that benefits Windsor-Essex for generations to come.

## HOW IT WORKS

**A Gift That Grows:** Your donation is invested over time, and only the earnings are used to support charitable initiatives, ensuring your principal gift remains intact.

**Continuous Impact:** The fund's earnings provide a permanent source of community capital, addressing local needs today and into the future.

## LEGACY AND STABILITY

**Make a Lasting Impact:** Your gift creates an enduring legacy, ensuring your charitable intentions are honored forever.

**Preserve Your Vision:** Community investments are made in the name of your fund, providing ongoing support to causes you care about.

**Give Beyond Your Lifetime:** Endowment funds ensure your generosity lives on, continuing to strengthen Windsor-Essex for future generations.

## WHY CHOOSE WECF?

**Trusted Stewardship:** For decades, we've helped donors turn their philanthropic visions into reality.

**Local Focus, Global Impact:** Your gift stays in Windsor-Essex, addressing the unique challenges and opportunities in our community.

**Ease and Flexibility:** We handle all the administrative details, so you can focus on the joy of giving.

## TAILORED GIVING OPTIONS

Focus on specific charitable organizations, causes, or fields of interest.

Establish a named scholarship fund to support education in areas you're passionate about.

## EXPERT GUIDANCE

### WHEN YOU PARTNER WITH WECF, YOU GAIN ACCESS TO:

**Local Expertise:** Knowledgeable staff who understand the needs of Windsor-Essex.

**Professional Management:** Skilled investment managers who grow your fund sustainably.

**Community Leadership:** Insights and connections to amplify the impact of your generosity.

## FAQ'S ABOUT ESTABLISHING AN ENDOWMENT FUNDS

### IS THE DONATION TAX DEDUCTIBLE?

Yes, the WECF is a registered charitable organization. We provide our donors with tax receipts for their generous contributions.

### WHO OVERSEES THE ENDOWMENT?

The Foundation Board oversees endowment investments, guided by the financial expertise of the Audit & Finance Committee, supported by WECF staff.

### WHAT ARE THE MINIMUM ENDOWMENT LEVELS?

The minimum initial principal donation to establish an endowment is \$20,000.

### WHEN WILL AN ENDOWMENT START PROVIDING FUNDING?

Payouts begin at least one year after creation, allowing the fund to generate revenue. Donors can contribute during this time to support payouts until the endowment becomes self-sustaining.

## ADVANTAGES OF BUILDING AN ENDOWMENT FUND

**TAX ASSISTANCE:** WECF 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 manages all administrative and investment details, allowing you to focus on your philanthropic goals, with expert oversight from our Audit & Finance Committee.

**CONVENIENCE:** The WECF offers a "foundation within a foundation," providing all the benefits of a separate fund without the burdens of managing a private foundation. We handle everything from grantmaking support and recordkeeping to investing and independent annual audits.

**FLEXIBILITY:** Establishing a fund allows you to address multiple interests. The WECF supports a broad base of community projects and services including: health, education, youth, the environment, recreation, arts, culture, 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

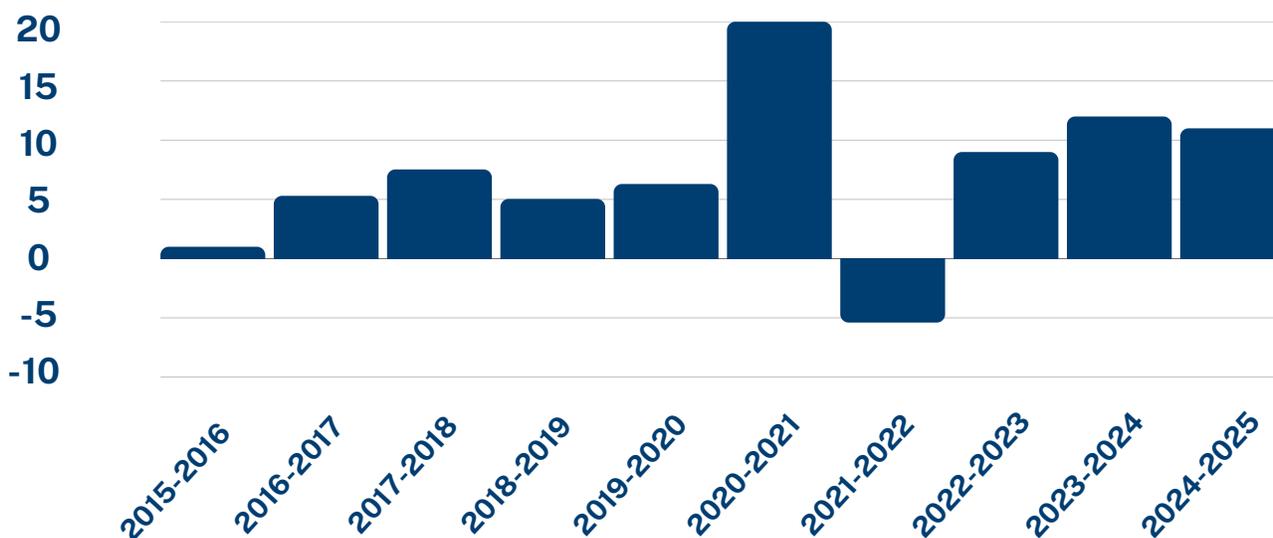
This is an example of what your fund could look like over the next 10 years with an initial investment of \$100,000.

**\*\* Note that these numbers are only estimates and have been calculated based on data from previous years.**

Year	Investment Earnings (8%)*	Investment & Administrative Fees (2%)	Granting (5%)	New Balance
2018				\$100,000
2019	\$8,000	\$2,000	\$5,000	\$101,000
2020	\$8,080	\$2,020	\$5,050	\$102,010
2021	\$8,161	\$2,040	\$5,101	\$103,030
2022	\$8,242	\$2,061	\$5,152	\$104,060
2023	\$8,325	\$2,081	\$5,203	\$105,101
2024	\$8,408	\$2,102	\$5,255	\$106,152
2025	\$8,492	\$2,123	\$5,308	\$107,214
2026	\$8,577	\$2,144	\$5,361	\$108,286
2027	\$8,663	\$2,166	\$5,414	\$109,369
2028	\$8,749	\$2,187	\$5,468	\$110,462
<b>TOTAL</b>	<b>\$83,698</b>	<b>\$20,924</b>	<b>\$52,311</b>	<b>\$110,462</b>

**\*\* Note: the 8% rate is for the illustration purposes only. Returns vary from year-to-year depending on market returns and investments.**

## ENDOWMENT FUND RATE OF RETURN OVER 10 YEARS





## ENDOWMENT FUNDS AT THE WECF

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**

**WINDSOR ESSEX 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**

**JOE & HAZEL LACEY MEMORIAL FUND**



FUND HOLDER STORY:

# HITCHCOCK FAMILY FOUNDATION FUND

HELD AT THE WINDSORSEX COMMUNITY FOUNDATION

Established in 2015 by Jon and Shirley Hitchcock at the WindsorEssex Community Foundation, the Hitchcock Family Foundation Fund reflects their belief that giving back is about more than financial contributions — it's about fostering a spirit of generosity across generations.

## THE POWER OF A DONOR-ADVISED FUND

A donor-advised fund is one of the most powerful tools for families and individuals seeking to make a lasting impact in their community. It provides a flexible, efficient, and impactful way to give back, allowing donors to support causes they care about while ensuring long-term sustainability for those organizations.

For the Hitchcock family, the donor-advised fund model has been the perfect vehicle to carry out their philanthropic vision.

## A FAMILY AFFAIR

Jon and Shirley knew true philanthropy is a family affair. Their donor-advised fund provides the flexibility and structure to recommend grants to local charities that align with their shared values — focusing on health, education, and community development in Windsor-Essex.

## A LIVING LEGACY

What makes their approach unique is how deeply the entire family is involved. Jon and Shirley's children and grandchildren actively participate in selecting grant recipients and hand-delivering cheques each year, building meaningful connections with the organizations they support. This hands-on tradition helps younger generations see the real-world impact of their giving.

The fund is more than a financial resource — it's a living legacy of compassion and service. Alongside financial support, the Hitchcock family volunteers their time, with Shirley's 13 years at the Amherstburg Food & Fellowship Mission exemplifying their commitment to community.

By establishing a donor-advised Fund at WECF, Jon and Shirley created a sustainable platform for thoughtful giving today and for generations to come. The Hitchcock Family Foundation Fund stands as a shining example of how one family's shared vision can leave a lasting legacy of generosity and impact.

# WAYS TO GIVE

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## GIVE TO THE WECF 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 funds that provide support to various causes across Windsor-Essex County including children & youth, the environment, literacy, and health and human services. A completed list of current funds at the WECF can be found on our website [www.wecf.ca](http://www.wecf.ca)

## ESTABLISHING YOUR OWN ENDOWMENT FUND

Establishing your own endowment 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, or establish your own fund.

## FLOW THROUGH FUNDS

We offer a flow-through option which allows you to make your gift 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.





INSPIRING PHILANTHROPY TO BENEFIT OUR COMMUNITY TODAY AND FOREVER

### **THIS IS OUR VISION FOR OUR COMMUNITY**

The WECF is a charitable organization dedicated to improving communities across Windsor-Essex County through collaboration, strategic leadership, and innovative solutions to charitable giving. Our mission is to build a better Windsor-Essex community by attracting and managing legacy funds, making grants to support local programs, and building community partners together!

### **WHY WORK WITH US**

The WECF provides you with the opportunity and flexibility to create your own personal philanthropic fund suited specifically to your needs and interests. Every donation to an endowment fund at the WECF is kept in perpetuity. This means that only the proceeds earned from investment of your donation are used to grant back to the community. An endowment is an everlasting gift to the community, continuing to give year after year to the causes and charities you care about.

### **OUR IMPACT**

Leaving a legacy at the WindsorEssex Community Foundation is about creating the change you want to see in the work We can work with you to identify how to have the greatest impact with your legacy today, tomorrow, and forever!

**WINDSORESSEX COMMUNITY FOUNDATION**

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