

Expressing your philanthropic wishes through an enduring gift to your community



Donor Advised Fund

Setting up a Donor Advised Fund at the Community Foundation of Greater Peterborough enables you to make a gift to your community and remain involved in supporting causes that are meaningful to you.

One of the most common types of funds at the Foundation, a Donor Advised Fund is a convenient, flexible tool for individuals and families who want to make an enduring gift to their community and be personally involved in directing grants from their fund to registered charities.

If you have a range of community interests, a Donor Advised Fund can be the ideal vehicle for fulfilling your charitable wishes. Cost effective and hassle-free, a Donor Advised Fund is easier to administer than other forms of philanthropic giving, such as a private foundation.

With a Donor Advised Fund, you have access to the Foundation's knowledgeable, professional staff who understand local issues, understand community needs and have strong relationships with community leaders, charitable organizations and other funders.

The Community Foundation of Greater Peterborough is open to all who wish to make their community a better place to live and work, now and in the future. Separately named funds, from many donors, are pooled and invested. Income earned by these funds is granted to support charitable programs and services, helping to build and sustain a vital community, now and for years to come.

Gwen and Bill Brown Fund for the Arts

Long-time residents of Peterborough, Gwen and Bill Brown were very active in the performing arts and theatre scene.

When asked why she chose to establish a Donor Advised Fund, in their memory, their daughter, Ginger Brown, said

"I like the fact that a fund in Mom and Dad's names will give back to the community for many years to come. Their legacy will continue here in the city that meant so much to them."

Since setting up her fund, Ginger has directed grants to Peterborough Theatre Guild - an organization her parents helped to found and where Gwen acted, sang and directed as well as to Showplace Performance Centre and to New Stages Peterborough. With the Foundation's help she will continue to direct grants to these and to other community-based arts organizations.

What it costs

Entrusting your charitable endowment to the Community Foundation is a simple and cost-effective way to carry out your philanthropic giving.

A Philanthropic Advisory Service Fee (PASF) is levied, to help offset the Foundation's work on your organization's behalf.

- 1.00% per year on first \$1,000,000
- .75% on next \$1,500,000
- .5% on next \$2,500,000
- Negotiable for amounts over \$5,000,000

In addition to the PASF, investment management (.60%) and custody fees (.05%) are deducted by the Foundation's external investment managers.

The Foundation is able to facilitate gifts of securities, real property, life insurance and donations from US donors. Fees for these services vary and will be discussed with you.

A Donor Advised Fund is just one type of fund offered by the Foundation. There may be others more suited to your goals. We're happy to discuss your philanthropic interests and ways in which the Foundation can help you to express them.

How it works

- You make a donation to the Community Foundation and receive an immediate tax receipt.
- The Foundation sets up a special fund in your name (or in a name of your choosing).
- A fund agreement sets the terms of the arrangement.
- You receive yearly fund statements.
- You recommend grant recipients - working with the Foundation staff to support the causes and charitable organizations you care about most.
- If you wish, you may involve multiple generations of your family in making grant decisions.
- You (and others) may add to the fund at any time.
- Administrative details are managed by the Foundation.

Invested for Good

Your fund capital is pooled with other funds held by the Community Foundation and invested in a broadly diversified and conservatively managed portfolio with an objective of generating a total investment return that preserves capital, delivers reasonable growth, provides income for granting, recovers the cost of managing and administering the funds and establishes a cushion against potential market declines while minimizing risk and volatility.

Community Foundation of Greater Peterborough

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**Community
Foundation**
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