

What is your will?

I WILL empower women and children

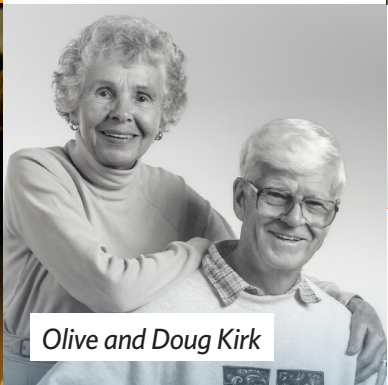


Teresa Daw

I WILL enhance learning opportunities for students with disabilities



Dr. Joyce Barrett



Olive and Doug Kirk

I WILL support musicians and emerging artists

Providing a Gift in Your Will

Philanthropy doesn't have to be complicated. It's a quality that already exists inside of you. It's your generosity of spirit, your desire to help, a firm belief that you can make a difference.

Including a charitable bequest in your will is a simple way to make a lasting gift to your community while offering you convenience and peace of mind for your future plans.

What causes are near to your heart?



Whether you are passionate about affordable housing, education and care for those in need or the arts, recreation and environment, your gift will help to address the challenges and opportunities facing Peterborough for years to come.

How it works

- You include the community foundation in your will as a bequest; we can help you or your lawyer with recommended language.
- Community Foundation staff work with you to determine the type of fund you would like to establish with your gift...or the established fund you would like to donate to. A signed fund agreement is the best way to ensure that your giving goals are achieved.
- Upon your death, we set up a fund in your name, in the name of your family, or in honour of any person or organization you choose. Alternatively, a donation is made to the established fund designated by you.
- Your charitable gift is eligible for a tax credit for estate tax purposes.



Invested for good

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

What it costs

Entrusting your charitable legacy 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.

In addition to the PASF, the Foundation's external investment managers deduct investment management (0.6%) and custody fees (0.05%).

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.

Family Foundation or Community Foundation Fund? Setting up an independent family foundation may be appealing, but that option includes the need for administration, investment oversight, policy development and back office management – all costing valuable energy and time. Establishing a fund at the Community Foundation can be a great alternative. You draw on the wealth of experience of our staff and investment managers while creating a unique expression of your philanthropic wishes. A simple, convenient alternative for strategic giving.



202-261 George St. North, Peterborough ON K9J 3G9
705.740.2347 • cfgp.ca • info@cfgp

 [cfgp_](https://twitter.com/cfgp_)

   [communityfoundationptbo](https://www.facebook.com/communityfoundationptbo)

 [communityfoundation_ptbo](https://www.instagram.com/communityfoundation_ptbo)

#VitalPtbo

Charitable Registration Number BN 8762 32315 RR0001