

what

is a community foundation?



community foundation

a platform for building community



We are a public charity created by and for
the people of Mississauga.

Our mission is
matching acts of caring with community needs.

A community foundation
has three special features.

feature One

Endowment building & personalized service



- › **Identify** charitable giving options
- › **Customize** giving approaches to match personal interests and tax planning needs
- › Facilitate **complex forms** of giving
- › Share **knowledge** on community priorities
- › Offer **grantmaking** expertise and administrative services
- › Offer **involvement** in recommending uses of a gift
- › Help people create **personal legacies** via named funds
- › Provide the option to give **anonymously**

Creating solutions that fit every situation

feature two

Local grantmaking expertise



- › **Local** organization with local staff and board members
- › **Knowledge** of community issues, opportunities, and resources
- › **Monitor** all community needs...

Arts & culture

Children & youth

Education

Environment

Health

Social services

Sports & recreation

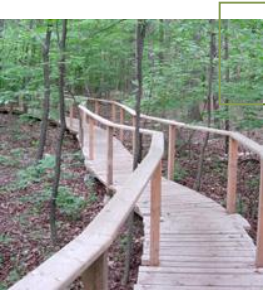
Seniors

- › **Gather** information and track local agencies and programs
- › **Direct** grants and resources to appropriate areas

Making a difference where it is needed most

feature three

Community leadership



- › Act as a **community catalyst**
- › Build **endowments** to ensure grants are always available to support the community
- › Support **high impact** opportunities
- › Are governed by leaders with **strong ties to our community**
- › Foster development of **new organizations** and programs
- › **Re-direct** funds as community needs change

Our business is building community

foundation facts

A brief history

1921

First Canadian community foundation established in Winnipeg, Manitoba

2001

Community Foundation of Mississauga established

today

More than 165 community foundations across Canada

- › Serving citizens across the country
- › More than \$2.7 billion in assets
- › More than \$137 million in local grants each year
- › And growing!

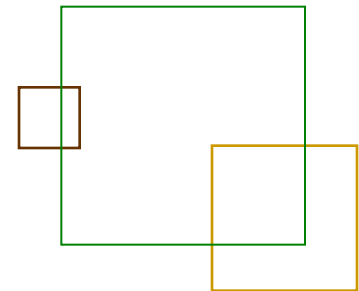
foundation facts

Our vital statistics



Community Foundation of Mississauga:

- › About **\$15,000,000** in endowed assets
- › Cumulative grants of about **\$800,000**
- › We serve all of the diverse areas and neighbourhoods of Mississauga





Involved community leaders

Steven Offer, President

Vice President, FNF

Tom Cooney, Vice President

Senior Financial Advisor, Assante Wealth Management

Peter Campbell, Treasurer

Senior Partner, BDO Dunwoody

Paula Deering, Secretary

Human Resources Manager, Peel Senior Link

Steven Hemphill, Director

Branch Manager, Scotia McLeod

Mary Main, Director

Lawyer

Chief Emmanuel Mbulu, Director

President, Tone-a-matic

Dan McCartney, Director

Vice President and Investment Advisor, RBC Dominion Securities

Gary Reamey, Director

Principal, Edward Jones Canada

foundation facts

Our grant examples



- › Youth and teen program funding
Peel Children's Aid Foundation
- › Health and human services grants
Get Active Mississauga, YMCA
- › Environmental issues
Rattray Marsh Living Discovery Centre
- › Arts, culture and heritage
Cabin in the Woods, Benares Museum



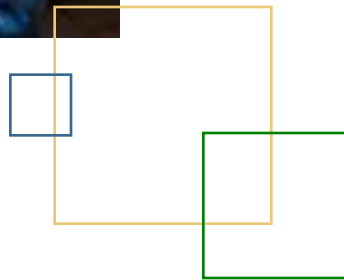
named funds

A personal legacy of giving



Donors can establish a fund in their name, in a family's name, or in the name of any person or organization they wish to honor.

Grants distributed from a donor's fund are awarded in the name of their fund. This person or organization will always be remembered and linked to good works in our community.



tools

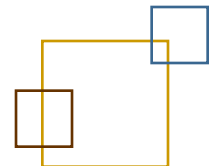
for giving

Charitable funds



- › **Unrestricted or Community Fund**
Meeting ever-changing community needs
- › **Field of Interest Fund**
Addressing needs in an important area of community life: arts, AIDS, aging, at-risk youth...
- › **Designated Fund**
Directing gifts to specific agencies or purposes (e.g., scholarship)
- › **Donor Advised Fund**
Involving donors in the use of their gift
- › **Agency Endowment Fund**
Establishing or managing endowments for local charities

*You can create a named fund
in any of these categories.*



tools

for giving

Charitable instruments

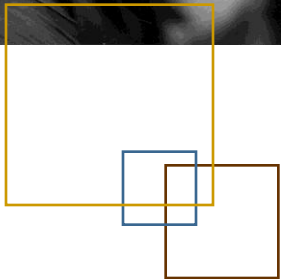
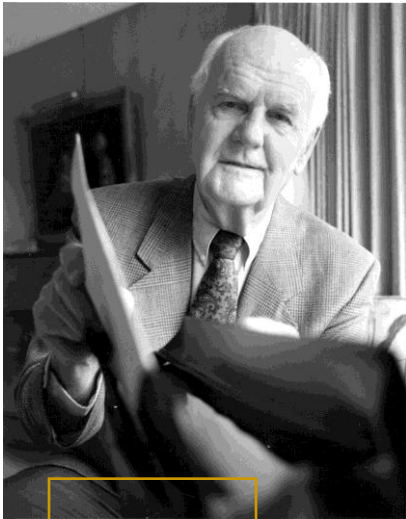


- › **Outright Gifts**
Give cash, stocks, real estate or other assets
- › **Appreciated Securities**
Eliminate capital gains tax by giving to a community foundation
- › **Bequests**
Designate a portion of an estate
- › **Life Insurance**
Designate a community foundation to receive a portion or all proceeds from policy
- › **Charitable Remainder Trust**
Trust pays beneficiary for life and then assets transfer to community foundation

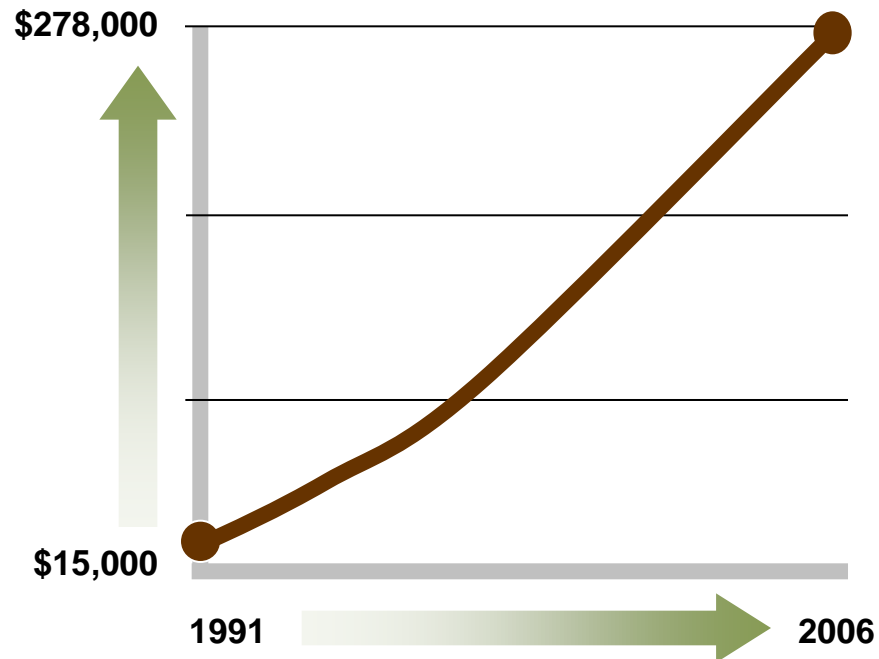
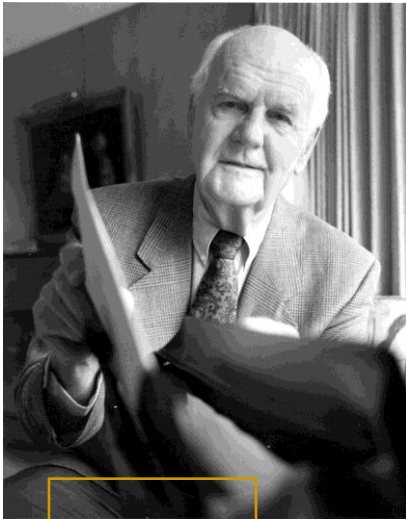
We accept a wide variety of assets.

Background:

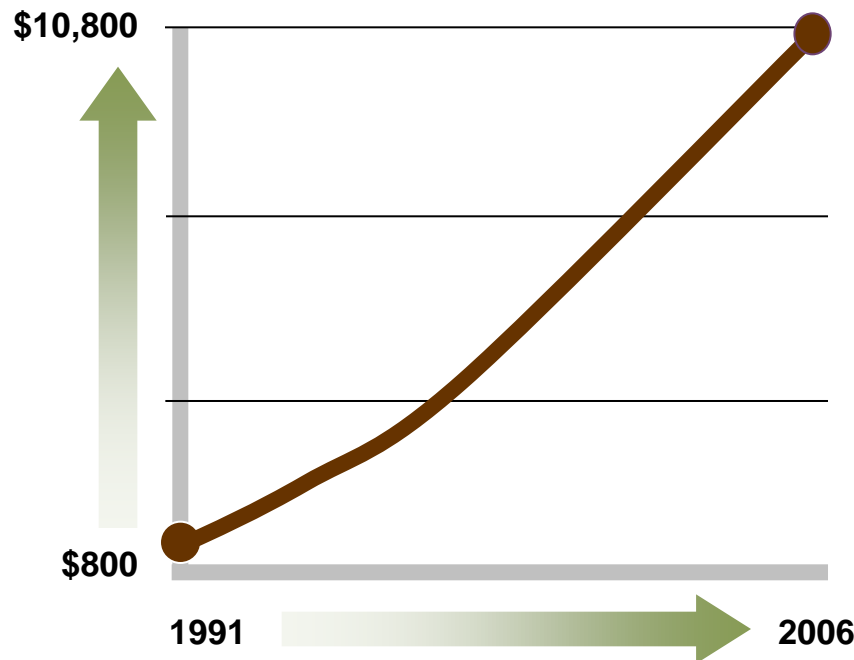
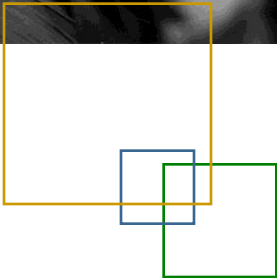
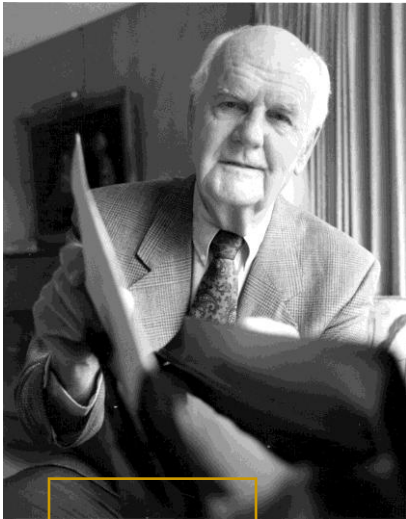
- › Served his country during World War II
- › Career as a financial planner
- › Personal philosophy: be a good citizen, encourage others
- › Motivation: to give back to the community that has been good to him
- › Established permanent endowment fund at local community foundation in 1991



**The growth of the Charles F.J. Harvey Family Fund
(initial gift plus additional contributions)**



The Charles F.J. Harvey Family Fund: Granting



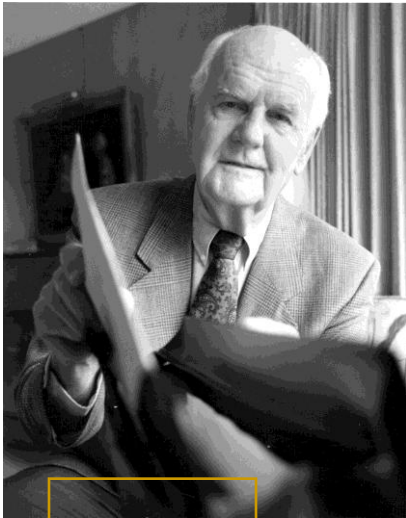
\$76,400 in grants to date

Since 1991, initial gift amount given away five times!

His undesignated gift is now funding:

- › Recreation for at-risk youth, isolated seniors
- › Opportunities for the physically challenged
- › Accessible education for students with barriers
- › High school *Youth in Philanthropy* projects
- › And much, much more

Community needs are constantly changing. Undesignated gifts allow the community foundation to respond to shifting needs and safeguard your charitable intent.



people

giving back

The advantages of planned giving



The Wordhams' goals for this gift:

- › **Create** positive change in their community
- › **Provide support** for the long-term
- › **Minimize** gift cost through tax savings



people

giving back

The advantages of planned giving



Gift Creates Wordham Family Fund:

- › In 2006: Transferred **appreciated securities** to Community Foundation of Mississauga
- › Donor Advised fund created
- › Additional gift of life insurance policy
- › Additional gift of appreciated securities in 2007 and 2010
- › Long term commitment to grow the Wordham Family Fund and involve their children in the annual granting



ten reasons

*People choose to give
through community foundations*



- 1 We are a **local organization** with deep roots in the community
- 2 Our staff and volunteers have **broad expertise** regarding community issues and needs
- 3 We provide highly **personalized service** tailored to each individual's charitable and financial interests
- 4 Our funds help people **invest in the causes** they care about most
- 5 We accept a wide **variety of assets**, and can facilitate even the most complex forms of giving

ten reasons

People choose to give through community foundations



- 6 We partner with **professional advisors** to create highly effective approaches to charitable giving
- 7 We offer maximum **tax advantage** under federal law
- 8 We **multiply the impact** of gift dollars by pooling them with other gifts and grants
- 9 We build **endowment funds** that benefit the community forever and help create personal legacies
- 10 We are a **community leader**, fostering collaboration on issues of broad interest to create positive change.



Community foundations are among the
fastest-growing
forms of philanthropy in Canada today.



He **plants a tree**
to benefit another generation.

Roman poet

For good. For ever.SM



To learn more about us, contact
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