



CANADA
GIVES 🍁

Canada Gives Annual Impact Report 2018





CANADA GIVES

At the heart of your philanthropy

Creating meaningful change in the world—and finding the spark that ignites your altruistic passions—means something different for everyone. But we can all agree that smart philanthropy, built on enduring partnerships, is the most effective way to deliver hope to those who need it most.

Canada Gives is committed to helping individual and corporate philanthropists build high-impact foundations and to maintaining a steady flow of donor capital into the charitable sector. Our dedicated donors understand that creating meaningful change is about more than writing a cheque and hoping that your donation will help somebody, somewhere. It's about finding a better way to use your wealth to transform lives and make the world a better place.

We're proud to say that over the past year, we've made huge strides in our mission to support philanthropists and fund charitable organizations at home and abroad— enabling our donors to make a real impact on the success of charitable programs.

A message from our founder and CEO

What a year it's been for philanthropists here at Canada Gives. As you'll see in this report, your generosity continues to support a wide range of life-changing charities covering all walks of life. Our entire team is inspired by your passion for giving back, for creating a lasting legacy for you and your family, and for creating real change in your community—and beyond.

So much so that we've taken strides in the past year to optimize our own processes and find innovative new ways to support your philanthropic efforts. We started by conducting extensive research to better understand your objectives and why you take the time and commit your hard-earned dollars to funding one (or many) of your preferred charities. We learned that as dedicated philanthropists, you share similar values and common motivations:

- You want to make the world a better place, and that usually starts by supporting organizations in your local community
- You utilize philanthropy to bond with family and/or to further spiritual goals
- You consider philanthropy an efficient vehicle to mitigate tax liabilities
- You strive to make a sustainable impact at home and, in some cases, abroad
- You want to be more organized and strategic with your philanthropy, all to enhance the long-term impact of your giving

While this is only a snippet of the trove of information we collected en route to discovering how we could better serve your needs, it helped us define our long-term strategic goals as an organization—and we're very excited for what lies ahead.

We can't wait to continue our work together. As Canada Gives expands its charitable giving footprint, we're dedicated to helping you take the next step towards achieving your philanthropic goals.

J. Denise Castonguay



How our donors made a difference

The generosity we see from our donor’s Foundation accounts is truly awe-inspiring. The grants they make every year continue to fund a wide-range of charities across Canada. By providing new and additional funding to Canada Gives Foundations, and making significant annual disbursements, we know they are changing lives across our communities.

A snapshot of our success since inception



\$80M

in receipted donations
of cash or securities



\$112M

in gifts of insurance;
>44 Million of paid up policies



>\$30M

disbursed to
Canadian Charities
(40% of available funds)



\$1.1M

spent on foreign
charitable activities

Financial Highlights 2018

\$17,384,898

received in new donations

128

donor advised funds (DAFs)
administered, operating as family
foundations across Canada

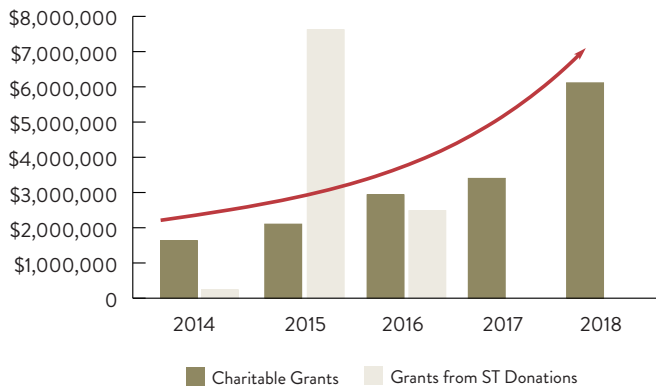
\$6,114,182

disbursed to charitable organizations
across the country, issuing 593
individual grants/gifts that were
recommended by our donors.

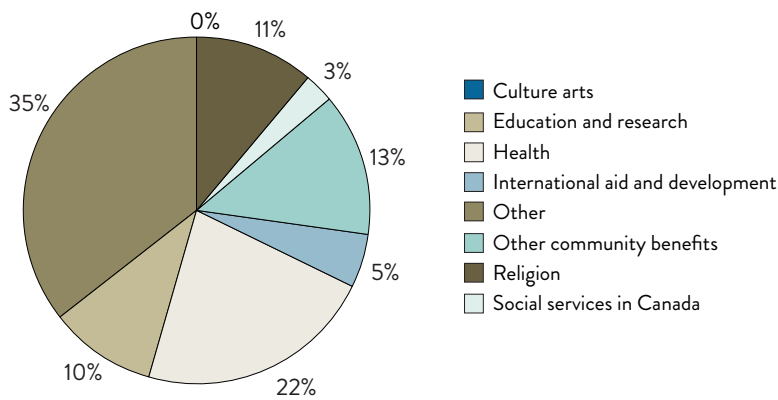
>\$40,000,000

managed in assets destined
for future giving

Gifts to Charities



5 Year Giving Profile



How some of our clients became great at giving back—and changed their lives in the process

Our clients have made an indelible impact on the world around them. Here are a few of their stories:

“Being philanthropic has helped create awareness beyond our bubble.”



DONOR STORY 1

How giving back brings a Vancouver family closer together

One of the most heartwarming aspects of philanthropy is the way it can help families build stronger bonds. Take one Canada Gives Foundation account holder from Vancouver, whose husband passed away suddenly at age 50. Devastated, the mother of two then-teenaged daughters found herself managing a hefty tax liability yet was determined to create a lasting family legacy from her husband's untimely passing. To help mitigate capital gains taxes, she established a Canada Gives Foundation account and made an immediate \$250,000 donation, thereby gleaning a significant tax benefit. What she didn't realize at the time was the long-term impact those philanthropic pursuits would have on her family.

The account currently holds about \$2 million and is managed by her daughters, who now have children of their own, as well. The two sisters embraced the responsibility of carefully managing such an important pool of charitable funds and have worked to personally engage with the charities they support, understanding how their giving goals align and making multi-year funding commitments to maximize their impact.

In fact, they became so engaged with the charities that they have proactively approached leadership to better understand the organizations' needs and how their foundation can provide further assistance. They're currently developing a website to showcase their work and intake grant requests, adding further process and organization to their already robust philanthropic efforts.

It may have taken eight years, but from a tragic death an entire family of committed philanthropists was born.

DONOR STORY 2

An accidental philanthropist finds joy in giving back

Not everyone follows the same path to philanthropy. For one Canada Gives Foundation account holder—a financial industry executive—it was only by a chance event invitation that he discovered his passion for giving.

In this case, and while still early in his career, the individual was invited to a charity gala by his manager, who also happened to be an active philanthropist engaged with several charities and non-profits ranging from hospitals to universities. He wound up on stage during a cheque presentation and found his photo in a major newspaper the next day. He liked the feeling, and started researching the potential tax planning and savings opportunities that accompany active philanthropy in Canada. He was intrigued by the possibility of establishing a Canada Gives Foundation account with as little \$25,000, and that every year as his salary and tax liabilities grew, he could donate money to his own foundation as a tax planning strategy, while also creating a meaningful impact. The importance of those efforts was underscored when one of his children spent a period of time receiving care from a local children’s hospital, which he has since generously supported.

Now, a trusted financial advisor tasked with managing millions of dollars on behalf of his clients has created a lasting legacy for his family. His now-teenaged children help to decide which charities receive donations each year, and the family has even travelled to developing countries and homeless shelters to support those in need and help underscore the need to keep giving back. “Being philanthropic has helped create awareness beyond our bubble,” he says.



DONOR STORY 3

The joy of giving is music to a philanthropist’s ears

In many cases, philanthropists have a vision for creating change, but lack the connections to make it happen. When one of our clients established a testamentary account with Canada Gives before she passed away, she left high-level instructions as to how the funds should be disbursed. We were able to work with her estate trustee to establish a lasting legacy.

The client—a teacher with a deep passion for using music to improve lives—funded her Canada Gives Foundation account from her will. Upon retiring, she had donated her time playing music at seniors’ homes and quickly saw its therapeutic value. Having been moved by the power of music her entire life, she had a clear philanthropic vision: to fund music therapy charities for children and seniors across Canada. Working with her trustee, a member of our team researched potential charitable recipients, as well as music scholarships that the foundation could support in perpetuity. She found a wonderful music scholarship charity in Toronto that also supported children and adults with autism. The trustee disbursed funds accordingly, funding music therapy sessions and lessons for disabled children, while also providing scholarship funding to support their financial needs. Her foundation also contributed \$65,000 to purchase a new piano for Wilfrid Laurier University’s music program.

Now, after an introduction made by a Canada Gives team member, the trustee of the teacher’s foundation is working with an organization that hopes to bring music therapy to local hospices.

What a legacy—everyday someone, somewhere in Canada is singing the praises of a passionate music lover with a heart of gold.





Giving back on a global scale

Since 2012, the Canada Gives Global Projects Initiatives Program (GPI) has worked with Canadian donors who are committed to delivering sustainable solutions to help alleviate overseas poverty. Our projects are designed to gain community engagement and provide long-term relief of ongoing, systemic challenges.

We've helped donor clients develop several life-changing projects including:

- launching microfinance initiatives in Rwanda
- building medical clinics in Honduras
- constructing and funding a girls' school in the DRC that has since become a community hub and is now adding a vocational training institution for adults

In order to ensure the project is successful, our donors generosity isn't limited to a single gift. In the case of Canada Gives' Congo project, our lead funder also established a scholarship fund to help offset the school's operating costs and cover student tuitions once the school was completed. The project also include a garden and a kitchen to not only feed students but to sell excess bread to the community to enhance its financial sustainability.

Some prospective new projects are focused on establishing agricultural training programs in Mozambique and Malawi to teach local farmers to raise chickens and grow sweet potatoes.

And these are just some of the examples of the transformative philanthropic work that Canada Gives clients are doing around the world right now.

How Canada Gives creates lasting change

We work with generous donors that have a passion for giving back and a commitment to making a difference, helping to make the world a brighter place—not to mention helping drive our success as an organization. For Canada Gives, creating lasting change means helping our Foundation clients achieve their philanthropic goals. It's a responsibility that drives us to innovate and improve, all to ensure that we continue providing the very best service our industry has to offer.

Canada Gives Foundation clients enjoy a full complement of services to enhance their giving experience. Along with removing the administrative and reporting burden of a foundation, our client service team goes above and beyond to provide our donors with expertise, guidance and support in bringing their vision to life.



Foundation Mission Statement

Development and implementation



Customized In Depth Research

Comparison analysis & due diligence on over 86,000 charities across Canada



Profile Development and Management of Grant Applications

For those wishing to attract funding requests from the non-profit sector



Donor Connection

Provides opportunity for like-minded donors to collaborate



Advisor Relations and Support



Website Development

For those wishing to publicly promote their foundations and attract donations / grant applications



Fundraising Support

Including P2P platforms, customized donation forms and ongoing campaign reporting



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CONTACT CANADA GIVES

Let's work together!

Contact us directly or through your professional advisor, and we'll work to customize an individual or corporate Foundation account that achieves your specific goals.

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