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Setting Up a Canada Gives Donor Advised Fund

DONOR ADVISED FUNDS (DAFS) ARE COMMONLY USED THROUGHOUT NORTH AMERICA TO SET UP PHILANTHROPIC FOUNDATIONS.

In Canada's not-for-profit sector, Donor Advised Funds (DAFs) play an important role in the estimated \$70 billion endowment fund segment, which generated \$5.6 billion in charitable donations in 2015.

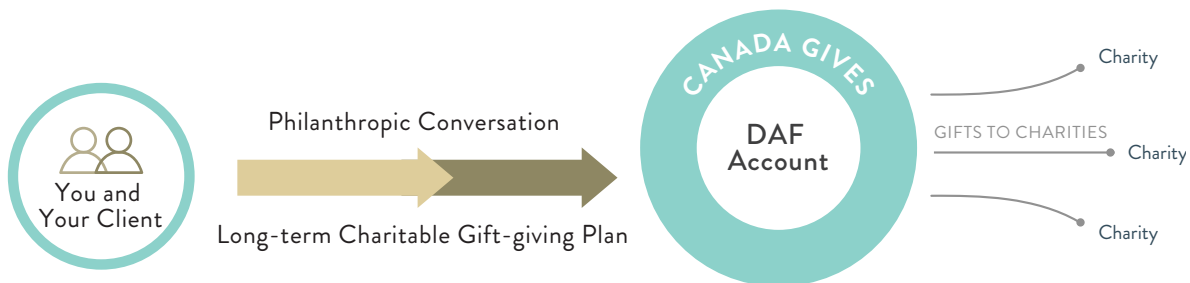
At Canada Gives, they are used as cost-effective and flexible option to setting up and managing a private family foundation.

A Donor Advised Fund account at Canada Gives (called a "Foundation account") can be set up in one day. And there are no setup costs. You can open a Foundation account for as little as \$25,000, but they are ideal for families who plan to establish endowment funds of \$100,000 or greater; and many are \$1,000,000+.

There are a number of unique advantages to a Canada Gives (DAF) Foundation account.

1. Donors select their own financial advisors to manage the donated assets.
2. There are no restrictions on investment instruments or managers. Advisors can select any pooled, segregated or mutual fund, or create a portfolio they feel is appropriate, as long as it complies with the Canada Gives investment policy and CRA rules.
3. A Canada Gives DAF account is portable; it can stay with the client's advisor even if they change firms.
4. Families have complete flexibility over the frequency and size of charitable gifts.

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5. A Canada Gives DAF is eligible to be listed in Imagine Canada's database of grant-giving foundations. It can be publicly accessible or held in complete anonymity, under the umbrella of Canada Gives.
6. Canada Gives has additional services to help DAF clients who wish to engage in foreign charitable activities.
7. Canada Gives DAF accounts can be useful in mitigating capital gains, and are a useful tool for charitable bequests and estate planning.

For more on philanthropy in Canada go to www.imagine.ca

For more on Canada Gives

Toronto office: 416 644 1673

Toll Free: 1 844 583-4483

Email: inquiry@canadagives.ca

www.canadagives.ca



About Canada Gives

Canada Gives is an independent charitable foundation established in 2005 to facilitate the creation of Donor Advised Funds. It has worked with more than 150 Canadian families and their advisors to set up and manage its Foundation accounts all across Canada. It is registered with the Canada Revenue Agency and the Revenue Quebec.

Banks, mutual fund companies and a number of public foundations throughout Canada offer Donor Advised Funds. Advisors who recommend Canada Gives DAFs consider them the most flexible option for themselves and their generous clients.