

A  
GESTURE  
OF  
THE  
HEART ♦

# ENDOWMENT FUNDS

**Leave your values as your legacy**



**Centraide**  
of Greater Montreal

# ENDOWMENT FUNDS

An endowment fund is a separate account that can be established within the structure of a registered charity, such as Centraide of Greater Montreal. Donations that supply the fund's capital are tax-deductible.



**Your donations**



**are invested**



**and generate income  
for Centraide**

<p><b>Different assets:</b> securities, cash, life insurance proceeds, etc.</p>	<p>by Centraide Investment Committee or the manager of your choice</p>	<p>according to the minimum required in the endowment fund agreement and by the asset manager's investment policy</p>
<p>IMMEDIATELY and/or IN YOUR WILL</p>	<p>IN PERPETUITY</p>	<p>FOR FUTURE GENERATIONS</p>

**Consult  
your financial  
advisor**

Note that this document is for information purposes only. We encourage you to contact your legal or financial advisor for more information about the type of charitable gift that best suits your goals and the needs of you and your family.

## A simple way to invest and give

Creating an endowment fund with Centraide of Greater Montreal is similar to setting up your own private foundation but without the worry of having to create or manage this type of entity or deal with the related administrative tasks and costs.

## Easy and flexible

While we above all recommend that your fund go toward the network of community agencies supported by Centraide of Greater Montreal, you may choose to donate to other charities.\*

Centralizing your investments will simplify your tax formalities, and you will get a single tax receipt.

\*Certain conditions apply.

## Grow your generosity and your long-term impact

The invested assets generate tax-free income, which lets you optimize your charitable giving and your impact over the long term. This fund could therefore outlive you and become a family project. Naming your fund after you or your family makes a significant personal statement and will highlight the importance of fighting poverty and social exclusion for years to come.

## **Benefits**

This type of gift is for you if you want to:

- Enjoy the tax benefits of a substantial donation after receiving a significant inflow of assets (for example, from the sale of a business, the exercise of a stock option, or a major inheritance)
- Make a donation right now and/or as part of your estate
- Provide your donations from a single, centralized source of funding

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## RECOGNITION

### Become a member of the Generations' Circle...

The Generations' Circle recognizes donors who have made a planned gift, such as an endowment fund, to Centraide of Greater Montreal.

### ...and inspire the community with a message of hope for future generations!

Your decision to contribute to our community will set an example of how anyone can show their local love in their own way and help build a fairer and stronger Greater Montreal.

Centraide of Greater Montreal's Planned Giving team can help you with the giving process in the strictest confidence. Contact us at 514-350-7295 or [heritage@centraide-mtl.org](mailto:heritage@centraide-mtl.org).



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