



CANADA  
GIVES 

# Philanthropy with impact

Your giving journey  
starts here

[www.canadagives.ca](http://www.canadagives.ca)





Become a part of the  
Canada Gives  
Family of Foundations

# At the heart of your philanthropy

Canada Gives is a donor advised fund (DAF) sponsor and a registered charity that serves the discerning private client market. We help major donors build high-impact foundations with the flexibility of a DAF, enabling them to deliver transformative value to recipient charities through their financial gifts.

Think of our organization as a family office for charitable giving. We're committed to enhancing your giving experience, maximizing the joy of giving back, while understanding how your charitable dollars are making a difference. Whether you have existing relationships in the not-for-profit (NFP) sector, or wish to discover new ones, our aim is to help you and your family become Foundation-style funders—transitioning from making ad hoc gifts to charities, to becoming engaged philanthropists, knowing that your charitable dollars are making a difference.

## How becoming a Foundation funder with a Canada Gives DAF has made a difference for our donor clients:



Source: Canada Gives 2019 Client Survey

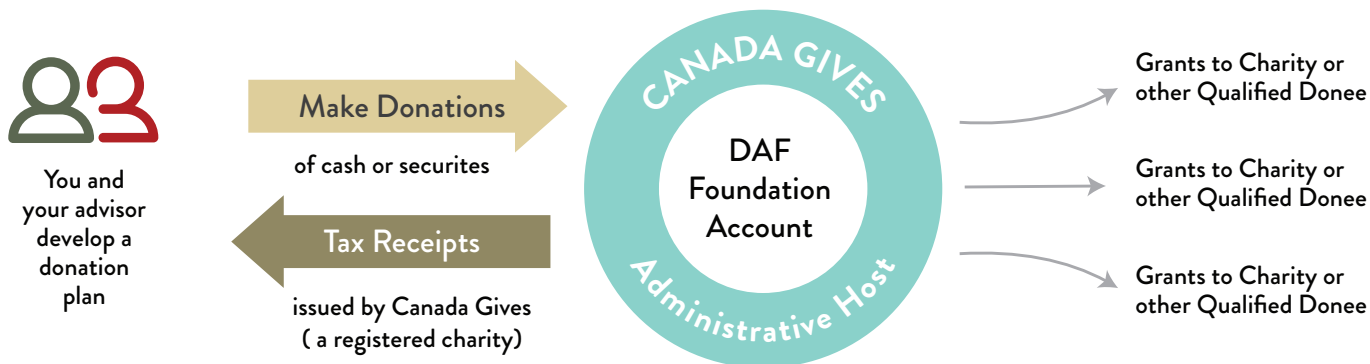
# The Benefits of Structuring your Giving

For many donors making large charitable gifts, using a donor advised fund at Canada Gives to create a family foundation offers many benefits, including:

- Centralized and simplified gifting to multiple charities
- The flexibility for you to choose a trusted advisor to manage your Foundation assets
- Opportunities to engage in multi-generational family philanthropy
- Easy ongoing support to key charities

## Understanding DAFs—Here’s how it works

A Canada Gives Foundation account makes it simple to support the causes that matter most to you. We handle the administration, reporting and governance, so you can focus on giving back. Here’s how a Canada Gives Foundation account works:



*“We were looking for a method to effectively distribute funds so we didn’t get bogged down in administration, and Canada Gives provided that service with clarity and elegance.”*

Source: Canada Gives 2019 Client Survey

# A concierge approach to your philanthropy

## MANAGING CHARITY RELATIONS, RESEARCH AND STRATEGIC PLANNING

Consider our client services team your guides to the not-for-profit sector, delivering customized research and offering NFP sector tools and insights to help you achieve your giving goals. Our team supports your charitable giving decisions and activities with:

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**A STRATEGIC FOCUS FOR LONG-TERM GIFTING**

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**FAMILY-WIDE ENGAGEMENT IN YOUR PHILANTHROPY**

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**NFP SECTOR RESEARCH AND CHARITY CONNECTIONS**

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**MULTI-YEAR PLEDGES AND GIFT AGREEMENTS**

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**ANNUAL RECURRING GIFTS, SCHOLARSHIPS AND PLEDGES**

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**FUNDRAISING ADMINISTRATION SUPPORT**

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**EXPERTISE IN FOREIGN CHARITABLE ACTIVITIES**

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**BEST PRACTISES FROM OUR FAMILY OF FOUNDATIONS**

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*“We involve our kids in our charitable giving because we want them to be philanthropic. We’re creating a legacy, and Canada Gives has made that easy to do.”*

Source: Canada Gives 2019 Client Survey

## Working with Your Trusted Advisors



### **MANAGING YOUR CHARITABLE DOLLARS AS PROFESSIONALLY AS YOUR INVESTMENT PORTFOLIO**

One of the many advantages of a Canada Gives Foundation account is that you can recommend your own trusted advisor to manage the assets in your Foundation account. Because we're not aligned with any financial institution, your advisor can also make investment decisions based solely on market conditions and your giving plans. Canada Gives simply provides fiduciary oversight to ensure the Foundation's asset mix complies with the rules that apply to managing charitable dollars.

### **TOTAL TAX AND ESTATE PLANNING THAT INCLUDES PHILANTHROPY**

Maximize your giving potential with a donation strategy developed by the professional advisors that manage your tax and estate planning. Donations to your Canada Gives Foundation account can include gifts of cash, securities in kind, insurance or real estate.


*“There are no upfront costs with Canada Gives, they're fully independent and you can use your own advisor or money manager.”*

Source: Canada Gives 2019 Client Survey



# Reporting to you

Our detailed reporting service is specifically designed for managing foundations and donor advised funds. By adhering to the highest financial services standards of reporting and transparency, our platform enables you to oversee and quantify the impact of your generosity.



**Johnson Family Foundation**  
REPORT DATE: JUN30/2021

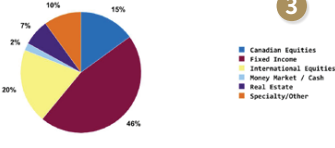
Prepared For: Charles Johnson & Mrs. Mary Johnson    Account No: CG 2021090  
 123 Street    Date Established: Dec/15/2009  
 Anywhere, Province    Advisor: Brent Babcock    1A1 2B2

**2 BALANCE IN THE ACCOUNT**

Date	Donations Contributions	Investment Gains/Losses	Grants to Charities	Closing Balance (Net of Fees)
Sep/30/2019		\$6,097.07	( \$28,000.00)	\$757,422.45
Dec/31/2019	\$18,707.18			\$773,818.63
Mar/31/2020		( \$83,560.00)		\$687,912.85
Jun/30/2020	\$74,565.07			\$760,314.15
Sep/30/2020	\$24,828.16		( \$36,000.00)	\$748,825.14
Dec/31/2020	\$46,330.63			\$790,857.18
Mar/31/2021	\$16,986.66			\$805,471.94
Jun/30/2021	\$31,662.36		( \$56,500.00)	\$778,221.46

**INVESTMENT OF ASSETS IN THE FOUNDATION ACCOUNT**  
 Manager / Dealer: ABC Private Capital Ltd.  
 John Brown

**PORTFOLIO HOLDINGS:**



**Annual Fees and Costs:**

1. Investment Management Fee :	0.99
2. Planning/Advisory Fee:	1.25
3. CG Admin Fee:	0.98


\*Fees may fluctuate when trading, custody and other expenses are included, particularly with Fund MERs

Charitable Registration Number: 833062144RR0001  
[www.canadagives.ca](http://www.canadagives.ca)

## THE QUARTERLY CONSOLIDATED REPORT

- 1 **You choose your trusted advisor**  
We're here to support and work with your choice of advisor or manager
- 2 **Summary of all financial activity, each quarter for two years**  
We offer an easy snapshot of giving
- 3 **Oversee how your social capital is managed**
- 4 **Full transparency**  
Highlighting all fees and costs deducted from the investment account

- 5 **Executive privileges**  
We calculate the minimum annual disbursement required by CRA and you decide how much more to give away
- 6 **Simplify and enjoy**  
You can focus on the charities you wish to support; we process the gifts for you
- 7 **Your charitable giving profile**  
Understand where your charitable dollars are going and direct support to the areas that matter most to you
- 8 **Track your multi-year commitments**  
This feature allows you to keep track of outstanding pledges supported by gift agreements



**Johnson Family Foundation**

**5 GRANTS TO CHARITIES**

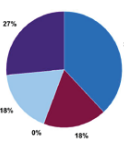
Total Grants for Current Fiscal		Minimum: \$20,561.77	Actual YTD: \$56,500.00
		Maximum: \$59,055.67	<b>TOTAL SINCE INCEPTION: \$452,880.00</b>
		Suggested:	

**6 Disbursements from the Account for Current Fiscal**

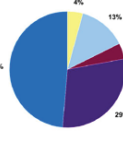
Date	Recipient Charity	Registration No.	Amount of Grant	Notes
Jun/03/2021	Boys And Girls Clubs Of Canada	118814656RR0001	\$15,000.00	
Jun/03/2021	Habitat For Humanity Canada	826572752RR0001	\$10,000.00	
Jun/03/2021	North York General Hospital	107786733RR0001	\$4,000.00	
Jun/03/2021	Sharelle	130632474RR0001	\$15,000.00	for St. Bonaventure Church
Jun/03/2021	The Sir Edmund Hillary Foundation	119150837RR0001	\$2,500.00	
Jun/03/2021	The Yonge Street Mission	119306181RR0001	\$10,000.00	
Total			\$56,500.00	

**YOUR CHARITABLE GIVING PROFILE**

**Current**



**7 Since Inception**



**PLEDGES / OUTSTANDING**

Campaign Year	Total Pledge	Recipient Charity	Paid	Balance
2021	\$150,000.00 (over 10 years)	Centre For Affordable Water And	\$45,000.00	\$105,000.00
2021	\$50,000.00 (over 5 years)	Trails Youth Initiatives Inc.	\$24,000.00	\$36,000.00
2021	\$50,000.00 (over 5 years)	Arts Umbrella Association	\$20,000.00	\$30,000.00

7876 County Road 9, Creemore, Ontario L0M 1G0  
 Telephone: (844) 583-4483    [www.canadagives.ca](http://www.canadagives.ca)

# Funding Charities + Making Your Legacy Count

**AT CANADA GIVES, WE BELIEVE PHILANTHROPY IS VERY PERSONAL—  
AND OUR SERVICES ARE BUILT TO SUIT YOUR NEEDS.**

Our client services team works with you to create a personalized letter to accompany each charitable grant you recommend; that way your giving is directed to the areas/programs you wish to support—and you receive recognition or anonymity, as you prefer.



## All we need to know when drafting your grant letter is:

- The direction for your gift
- The name of your Foundation
- Your name and address

## Your customized grant letter options include:

- Adding only your Foundation name
- Remaining anonymous
- Using Canada Gives' address when giving an unrestricted gift (no direction)



# Managing Grant Applications

## EFFECTIVE PHILANTHROPY. PURPOSEFUL ENGAGEMENT.

Most active family foundations select and fund charities through a grant application process. A grant application is a simple, standardized way to learn more about charities whose work aligns with your interests, and empowers you to evaluate whether or not you'd like to support them.

The image shows a screenshot of a grant application form titled "Grant Application TO A CANADA GIVES FOUNDATION ACCOUNT". The form is divided into several sections:

- REQUEST FOR FUNDING FROM:** A field for "Name/Account No. of Foundation account:".
- APPLICATION DATA:** Fields for "Date of Submission", "Name of Charity", and "Charity Website". A large text area for "Mission and Purpose of Charity".
- Registered Charity Address:** A field for the address and "Charitable Registration Number".
- Primary Contact:** Fields for "Position", "Contact Tel", and "Email Address".
- FUNDING REQUESTED:** A field for "Amount Requested (CDNS):" and a large text area for "What will the funds be used for? Describe the project/program including location, beneficiaries, timeline and expected outcomes. (Add attachment if necessary)".

- Broaden your knowledge of the organizations working on the issues you care about
- Focus your funding to where the greatest need exists
- Learn about new programs and strategies being undertaken to solve the most pressing issues in your community
- Decide how to allocate your gifts based on which charities achieve the greatest outcomes

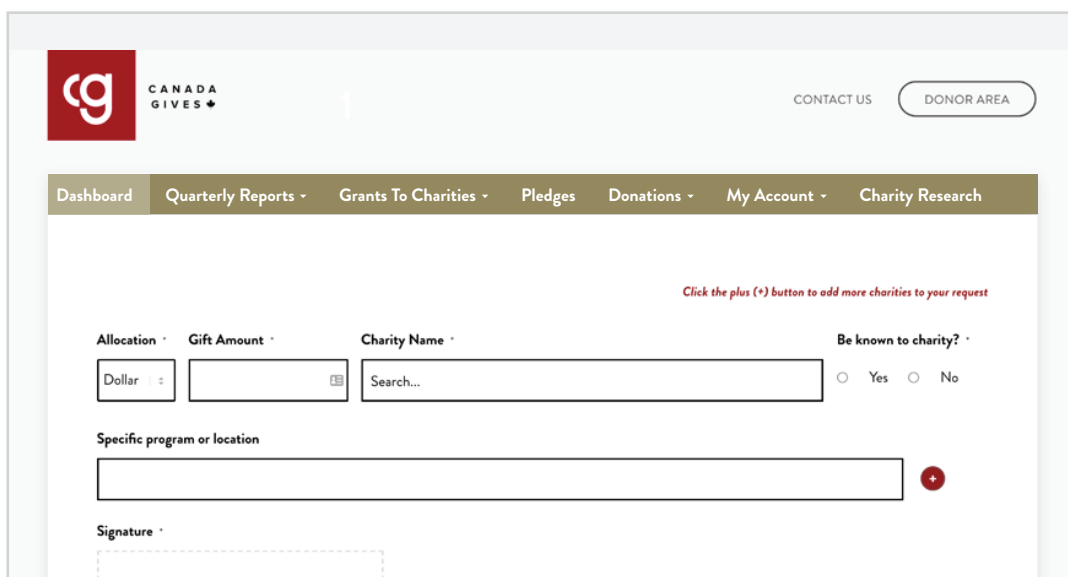
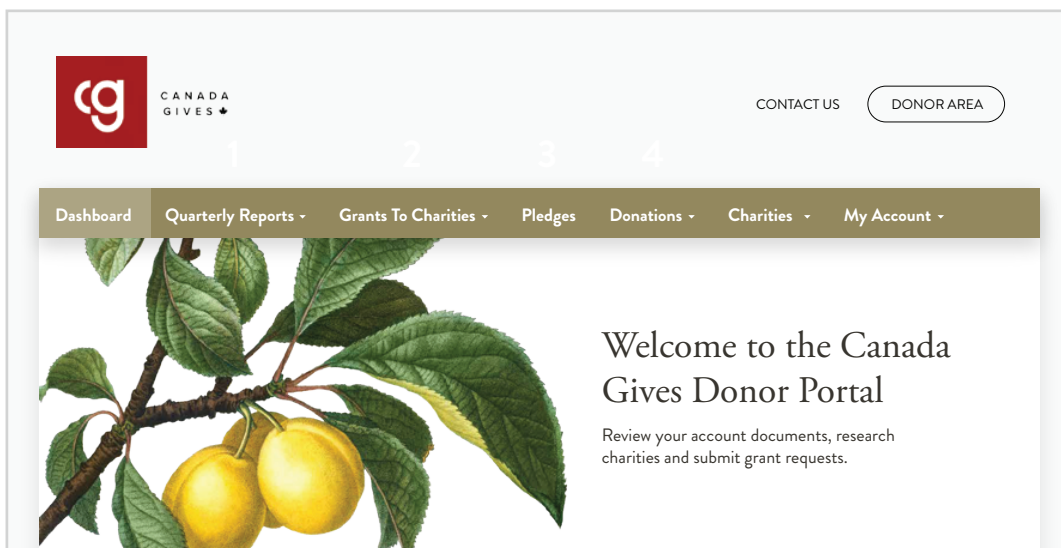
*“We love the service, dialogue and rapport with Canada Gives. There’s a feeling of attachment. It’s like having our own family office for philanthropy.”*

Source: Canada Gives 2019 Client Survey

# Powering your philanthropy with technology

## CUSTOMIZED DONOR PORTAL

Our user-friendly Donor Portal allows you to manage your giving activity and records in one easy-to-use online dashboard. Access your secure portal account from anywhere to view or download your Foundation account documents and make online grant requests, add multiple gifts to one request, or provide special gifting instructions.



## RESEARCH CANADA'S CHARITABLE SECTOR

One of the most popular features of our Client Portal is the online charity database of 86,000+ Canadian charities. It's a fun and informative tool that allows you to search for charities by name or by cause—and with one quick click receive a research report that provides you detailed program information and financial data. You can quickly become well informed before making grant requests based on your philanthropic interests.

Dashboard Quarterly Reports Grants To Charities Pledges Donations My Account **Charity Research**

### Charity Research

Interested in learning more about your favourite charity? Use the various search options to find out more. Charity Reports can be viewed, printed and saved into your portal files.

[REQUEST A GRANT NOW](#)

Find a Charity  
Search for a charity using any of the filters below.

KEYWORD  PROVINCE  CATEGORY  [APPLY FILTERS](#)

Quickly find charities that support:

- ANIMALS
- ARTS
- EDUCATION
- ENVIRONMENT
- HEALTH
- HUMAN RIGHTS
- POVERTY
- RELIGION
- RESEARCH
- SOCIAL SERVICES
- OTHER

Dashboard Quarterly Reports Grants To Charities Pledges Donations My Account **Charity Research**

**HEALTH**

## Canadian Foundation For Trauma Research And Education Incorporated./fondation Canadienne Pour La Recherche Et L'education Sur Le Traumatisme Incorporee

NORTH VANCOUVER, BC

*"Giving is not just about making a donation. It's about making a difference."*

[REQUEST A GRANT NOW](#)

**CHARITY INFORMATION**

- Phone: (604) 688-1766
- Email: [info@patsandfriends.org](mailto:info@patsandfriends.org)
- Website: [www.patsandfriends.org](http://www.patsandfriends.org)
- Address: Po Box 38639 Rpsl Metropolitan, North Vancouver BC, V7M3N1
- Phone: 1986-11-12
- Number: 132807348RR0001

**PROGRAMS**

The Canadian Animal Task Force Society (CATF) provides high volume, on site spay and neuter clinics for First Nations in order to improve the quality of life of dogs and cats living in these communities and to reduce human/animal conflict. Our group also provides vaccinations, tattoos and parasite control to the animals participating in our clinics. The CATF rescues dogs and cats that are placed with partner rescue groups to be rehomed. In addition, the CATF provides support, training, resources and guidance to First Nation communities in designing and implementing a successful community based Dog Care and Control Program (DCBCP). The components of...

[READ MORE](#)

**FINANCIAL INFORMATION**

Revenue [SEE LESS](#)

Total eligible amount of all gifts for which the charity issued tax receipts	\$12,906
Total amount received from other registered charities	\$13,300
Total other gifts received for which a tax receipt was not issued by the charity	\$2,843
Total revenue received from municipal/regional governments	\$29,440
Total non tax-receipted revenue from fundraising	\$9,580
<b>Total revenue</b>	<b>\$60,069</b>

*“Research is one of the key things that Canada Gives does better than others. Their Client Services team looks after you in terms of how many different charities you’re working with, and helps to review charities. The good feeling our family gets by working with them is just unbelievable.”*

Source: Canada Gives 2019 Client Survey



CANADA  
GIVES 

**Let's make a lasting impact together**

Contact a member of our team today

[www.canadagives.ca](http://www.canadagives.ca)

1-844-583-4483