

# CHARITY ENDOWED FUND

A charity endowed fund is like creating your own private foundation that generates perpetual unrestricted funding for your charity. Any charity can set up an endowment fund with the Mississauga Foundation.

Having an endowment fund also shows that your charity is financially stable and committed to the community, which is essential to many donors looking to leave a legacy through a charitable gift.

## Benefits of an Endowment Fund

- Creates a perpetual source of unrestricted funding from investment return
- Funds are pooled and professionally managed to reduce fees and generate greater returns
- Donated capital is permanently protected
- Prudent financial planning increases donor confidence

# Focus on your charity's mission and leave the fund management to the Foundation

When you establish an endowed fund at the Mississauga Foundation, your charity can leverage our investment and financial expertise. The Foundation has more than 20 years of experience managing funds and we offer the following services:

## 1. Donor services that facilitate gifts of:

- Cash
- Publicly traded securities Gifts
- of life insurance Bequests
- (gifts left in a will)

## 2. Professionally Managed Funds

- Our investment pool is managed by CC&L Financial Group, the second largest independently owned asset manager in Canada.
- Our Investment Committee is made up of industry professionals and provides oversight of the Foundations investments.

## 3. Fund Administration

- Process all donations, including estate gifts
- Issue tax receipts directly to donors
- Advise on complex gifts such as a bequest, life insurance, or gifts of securities
- Provide planned giving support to your fundraising team

## Endowment Building Support

- A personalized online donation page that makes it easy for your donors to contribute
- Online access to fund statements through our easy-to-use web portal
- Annual fund review and donor engagement resources
- Advice tailored to you and your donors about planned gifts and legacy giving

## Flexible Fund Types

Your charity can choose to set up either a permanent or non-permanent fund :

### Permanent Funds :

As the name implies, donations to a permanent fund are held by Mississauga Foundation in perpetuity. Donated capital is never touched, and grants are generated from investment returns.

You can establish a permanent fund with at least \$10,000. A start-up option is available for a \$1,000 donation. Ask us for details about this option.

### Non-Permanent Funds :

Any charity with a permanent endowment fund can also establish a non-permanent fund. A non-permanent fund shares in the investment pool, but the charity has the option to draw on the investment income and the donated capital.

# START YOUR ENDOWMENT FUND TODAY!

Contact us today with any questions about endowment funds or to start building one for your organization.

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