

Is it Time for a “Tune-Up” for Your Fund?

Dear Donor,

At the Mississauga Foundation, we’re committed to helping you make the most meaningful impact with your charitable giving. As part of our ongoing partnership, we invite you to participate in an annual review of your fund. This is an excellent opportunity to ensure your charitable goals are up-to-date and aligned with your evolving vision for the future.

Let’s review your fund together:

- 1. Update Fund Goals**
Reflect on your current charitable goals and explore new areas you might want to support. Is there an initiative or cause that’s captured your interest recently?
- 2. Update Your Contact Information**
Ensure your contact details are up to date so we can keep you informed about important updates and opportunities.
- 3. Ensure Future Fund Advisors Are Named**
For Donor Advised Funds, it’s important to name future advisors to maintain the continuity of your philanthropic efforts.
- 4. Add a Planned Gift**
Consider including a planned gift, such as a bequest, a gift of life insurance, or another legacy gift, ensuring your values and impact continue for generations.
- 5. Want More of Your Annual Donation to Go Directly to Charities?**
Add a Grant and Grow direction to your fund. This option allocates 40% of your donation to immediate grants, while 60% is invested to grow your endowment for long-term support.
- 6. Consider Making a Contribution to Your Fund This Year**
Contributions of appreciated securities or life insurance may provide additional tax advantages while increasing your philanthropic impact.
- 7. Introduce Us to Someone New**
Your referral may be the greatest gift you can give. If you know someone who shares your passion for making a difference, consider introducing them to the Mississauga Foundation.

We believe that regular reviews help ensure your fund stays aligned with your goals and continues to make a lasting impact in the community. If you’d like to schedule a review or if you have any questions, please contact us at ggumulka@mississaugafoundation.ca.

Thank you for your continued generosity and commitment to building a stronger Mississauga.