



## Information for Donors

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This information is copied from the GiftPact Foundation Inc. website. For more information, visit [www.giftpact.com](http://www.giftpact.com).

### Helping You Have the Greatest Possible Impact in Your Community

#### **The closest thing to your own personal foundation**

With GiftPact Foundation Inc., philanthropy meets flexibility and simplicity.

Since its inception, GiftPact has helped donors have a positive impact on vital programs and services in their communities.

With GiftPact, you can\*:

- distribute money from a professionally managed charitable fund as opportunities arise;
- deposit proceeds from an estate or a life insurance policy today and decide later how to distribute them to your preferred charities;
- grow, over time, a family gift intended for a large, future capital contribution to a favourite charity;
- avoid the administrative heavy lifting, reporting requirements, and expenses involved when managing your own family foundation;
- simplify your testamentary planning;
- appoint a representative to make decisions about your existing GiftPact fund or new testamentary gifts, consistent with your wishes;
- receive a charitable tax receipt for the current tax year, even if the gift is distributed over time or parked until you advise how to distribute the money;
- choose whether to remain anonymous, even to the charitable organization receiving your support; and
- designate flow-through shares and non-marketable property (subject to Board approval) as charitable gifts when charities might not accept them directly.

Your GiftPact fund is donor-advised. That means you recommend where your contributions go – and when. The team at GiftPact distributes funds on your behalf, and on your recommendation.

Gifts must be designated to charitable organizations in good standing with the Canada Revenue Agency. Since GiftPact launched in 2011, numerous hospital foundations, universities, museums, religious and cultural institutions, and other organizations have been the beneficiaries of gifts facilitated by GiftPact.

\*Subject to Canada Revenue Agency regulations.

# Opening a GiftPact Fund

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## It's easy to get started

One of the key benefits of coordinating your charitable giving through GiftPact Foundation Inc. is that it is easier than managing it on your own. GiftPact strives to make the process as uncomplicated as possible.

It all starts with a conversation with a GiftPact representative to assess how a GiftPact fund can help you achieve your philanthropic and tax-planning goals – short-term and long-term.

- Your goals will help determine your distribution style and habits. Together, we will determine the donor-advised fund structure that suits you best.
- You then transfer capital into your fund (a minimum of \$25,000 is required to get started). You can deposit any combination of cash, securities, marketable and non-marketable assets (subject to Board approval). A donor agreement is signed.
- You may then recommend how and when money is distributed to any registered Canadian charity from your GiftPact fund. There is no long paper trail involved in disbursing funds. You or your designated representative can simply contact GiftPact by phone or by email. (Transactions are subject to a minimum amount.)
- You are encouraged to add to your GiftPact fund over time. Each contribution to GiftPact generates a charitable tax receipt, even if funds are distributed to charitable organizations in a later year.
- Your GiftPact representative will contact you occasionally to help you re-assess your philanthropic goals as time goes on.

To arrange an initial consultation to see if GiftPact is right for you, please contact:

**Tasha Treichel, Client Service Specialist**  
Ph. (204) 944-2495 | [info@giftpact.com](mailto:info@giftpact.com)

## Giftgiving Options

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### Maximum flexibility for engaged donors

With your GiftPact Foundation Inc. fund, you have the option of distributing funds to registered Canadian charities in a variety of ways.

Funds are held in separate custodial accounts, which means donors receive detailed reporting that specifically highlights the performance of and transactions arising in their donor-advised fund.

### Conduit Fund

A Conduit Fund is the ideal way for distributing funds to charitable organizations in the short-term (typically within a year). Assets are invested in high-quality vehicles intended to generate short-term gains. There are no administration fees applicable to Conduit Funds. GiftPact may retain interest generated by the fund up to a maximum of 1.5%. Interest in excess of 1.5% is allocated to the donor-advised fund.

### Disbursement-Over-Years Fund

A Disbursement-Over-Years Fund is well-suited for donors who have made a long-term pledge, but who wish to fund it in the short-term to generate the charitable tax receipt in the current tax year. GiftPact would coordinate management of the asset, and distribute annually to the designated charity as pledged. GiftPact would keep an appropriate portion of the asset liquid and accessible to meet the charitable commitment, with the balance invested in a Flexible Endowment Fund to produce longer-term growth with access as required.

## Flexible Endowment Fund

A Flexible Endowment Fund is the appropriate avenue for donors who wish to only distribute all or a portion of the income generated by their GiftPact fund each year. Donors may also encroach on the capital to support their philanthropic objectives. The investment strategy for a Flexible Endowment Fund allows the capital asset to grow over time while the fundholder continues to recommend how dollars are distributed every year. It is a truly flexible option that empowers donors to support their favourite charities on their own terms.

## Continuing Your Legacy

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### Providing instructions upon death

A GiftPact fund allows a donor to appoint a family member or other representative to ensure that the donor's philanthropic interests are honoured after the donor's passing. Consistent with the wishes of the deceased, a representative may provide instructions regarding existing funds or new testamentary funds bequeathed by the donor.

It's easy to get started. For more information, contact:

**Tasha Treichel, Client Service Specialist**  
**Ph. (204) 944-2495 | [info@giftpact.com](mailto:info@giftpact.com)**

GiftPact Foundation Inc.'s management and administration services, as well as portfolio management services, are provided by Quadrant Asset Management. GiftPact Foundation Inc. and Quadrant Asset Management are independent entities.

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GiftPact Foundation Inc. is a registered Canadian public foundation operating under the Canada Revenue Agency Business Number 839545803RR0001.