

## Welcome to GiftPact Foundation

We are a registered Canadian charity that helps facilitate philanthropy through the use of donor advised funds.

A **GiftPact Donor-Advised Fund (DAF)** provides you an immediate tax receipt for your donation while allowing you the ability to distribute from your fund over time.

GiftPact makes it easy to support registered Canadian charities by providing our donors with many administrative benefits.

- ✓ Easier to open than a bank account.
- ✓ Personalized service delivered by our team of Donor Relations Associates.
- ✓ Charity contact - GiftPact serves as the point of contact unless you request direct contact with the charity.
- ✓ Anonymity – You can choose to donate anonymously or choose how you wish to be acknowledged by the charity.
- ✓ Simplified donation receipts. No need to keep track of multiple tax receipts, simply provide the charitable donation receipts prepared by GiftPact.
- ✓ Donor Impact Portal – our secure online portal allows you to:
  - view your current balance and past distributions
  - request a distribution to a charity
  - receive secure documents such as charitable donation receipts
  - schedule recurring distributions
  - diarized future pledge commitments

### **GiftPact donors have access to two types of DAF accounts.**

- 1- Impact Now account – acts as a charitable chequing account. Funds are held in cash for distribution to Canadian registered charities in the near future. GiftPact allocates interest earned in excess of 1.5% per annum to the DAF, subject to a qualifying minimum monthly balance.
- 2- Future Impact account - acts as an investment account for funds not intended for distribution in the near future. Managed by a Portfolio Manager, your charitable capital can be invested without taxation, until such time that the funds are requested to be distributed to a charity. There are fees associated with this type of account – refer to the DAF Agreement on our website.

**As a GiftPact donor** you will be able to support registered charities that are “qualified donees” by submitting a request using the Donor Impact Portal, by email at [info@giftpact.com](mailto:info@giftpact.com) or by calling 1-866-322-3227.

Simply provide the following information and GiftPact will do the rest.

- name of the charity, (must be registered with CRA)
- the amount you wish to distribute and how you wish to be acknowledged
- any details on a specific area or program that you wish to support

Upon completion, you will receive an email confirming that the distribution has been sent.

All distributions issued from your DAF must be for charitable purposes only. If there is a benefit or advantage to a person or corporation, it does not qualify as a charitable donation (i.e. dinner tickets); these are considered sponsorships. However, GiftPact is able to facilitate split receipting, where we issue a distribution to a charity for the charitable portion, if the person or firm pays for the “value” of the benefit received.

Additional contributions to your DAF can be made at any time, either by direct donation of cash, of securities in Kind, donation of a Life Insurance Policy, or through transfers from another foundation. GiftPact will provide a charitable receipt at the time any direct contributions are received.

If you would like to know more about how a GiftPact DAF would work for you, please contact one of our Donor Relations Associates listed below.

**Carolyn Rice**

Donor Relations Associate  
**204-944-3388**

[crice@giftpact.com](mailto:crice@giftpact.com)

**Esther Faleye**

Donor Relations Associate  
**204-944-8124 ext 322**

[efaleye@giftpact.com](mailto:efaleye@giftpact.com)