

vancouver  
foundation

# Establishing a Fund for Your Charity

At Vancouver Foundation, we manage over 700 endowment funds established by more than 500 charities from across Canada to help support their long-term missions. These funds support a broad spectrum of charities and range in size from \$10,000 to over \$40 million. Funds can be set up by the charity, with a major gift from a donor or with gifts from a fund-building campaign.

## Why Should Your Charity Establish a Fund?

An endowment fund can be a powerful tool for charities that want to plan for the future and provide their donors with another meaningful way to give. Many donors are attracted to the longevity of an endowment fund where the income generated from the capital provides stable funding to the charities they love. In years when donations are down, or government funding is reduced, income from the fund will still arrive.

## Benefits of Establishing a Fund

### FOCUS ON YOUR MISSION

When you establish an endowment fund at Vancouver Foundation your charity will immediately take advantage of our investment, accounting, tax receipting, and gift processing expertise. This means you can focus on your programs, services and donor stewardship.

### INCREASED DONOR CONFIDENCE

Having an endowment fund at Vancouver Foundation demonstrates to your donors that your charity is serious about its long-term financial stability and commitment to community for years to come. With over 75 years of experience supporting the charitable sector, investing with Vancouver Foundation can provide comfort to your donors.

### SUPPORT FOR ALTERNATIVE GIFTS

We can help facilitate a variety of giving options to the fund, including:

- life insurance policies;
- RRSPs, RRIFs and TFSA's;
- publicly-traded securities; and
- gifts from U.S. donors.

### ADMINISTERING PLANNED GIFTS

An endowment fund provides a vehicle for donors who wish to leave a gift in their Will to create a lasting legacy. For planned gifts to the fund, we handle all the administrative and legal obligations to ensure timely and full receipt from your donor's estate.

*"We strongly believe that through Vancouver Foundation, we can build a fund that will take care of our ongoing operating expenses, leaving us more time to focus on our museum and all the priceless artifacts we want to share with the public."*

Syd Pickerell, P.Ag. (Ret.)  
B.C. Farm Museum Association



## Building Support

Our years of experience working with endowment funds has shown that donors consider giving to a fund just as meaningful as annual giving for current operations. We can support you in your endowment-building efforts in the following ways:

- **PERSONALIZED DONATION PAGE**

We can create a unique donation page on our website specifically tailored to promote your charity’s fund. You can then link to this page on your website, social media and fundraising materials, making it easy for donors to contribute to the fund.

- **ONLINE ACCESS TO FUND STATEMENTS**

Through our *My Philanthropy* web portal, you can access fund information, including ongoing gifts made to the fund. This allows you to thank your donors in a timely manner.

- **MEETINGS AND PRESENTATIONS**

We are pleased to provide your staff and board with an annual review of the fund as well as tips on how to grow the fund through donor engagement.

- **A PARTNER IN LEGACY GIVING**

Our knowledgeable staff are available to meet with you and any donors who are considering leaving an estate gift to your charity’s endowment fund or who wish to create a new fund through an estate gift. We are an ongoing resource for any questions you may have about planned gifts—so you don’t have to be an expert.

## Fund Types

We have two types of funds—permanent and non-permanent

- **PERMANENT FUNDS**

The capital of permanent funds, like most of those held at Vancouver Foundation, is held in perpetuity. The income earned by the fund is paid to your charity each year according to the terms of the fund. With this type of fund, your charity cannot access the capital. Permanent funds tend to be most attractive to donors interested in giving large estate gifts, knowing their money will support your charity over the long-run. The minimum initiating capital required to establish a permanent fund is \$10,000 with a start-up option available at \$1,000.

- **NON-PERMANENT FUNDS**

Non-permanent funds provide a steady stream of income and allows your charity to make requests to access all or part of the fund’s capital to support future organizational needs. There are holding and notification periods to consider. The minimum initiating capital commitment required to establish a non-permanent fund is \$100,000.

## Further Information

For further information, please contact Donor Services at 604.688.2204 or [info@vancouverfoundation.ca](mailto:info@vancouverfoundation.ca).