

vancouver  
foundation

# Your Capital Options

We offer a tailored approach for your philanthropy with the option of a permanent or non-permanent fund to help you achieve your legacy vision.

## Permanent Endowment Fund

**I want to create a tradition for giving with a family legacy. It's important to me to continue supporting my favourite charity, long after I am gone.**

Vancouver Foundation is Trustee for more than 1,800 funds, and each one represents someone's investment in the future, for the benefit of us all. You can establish a named endowment fund, or you may choose to support one that already exists.

Establishing a fund requires a minimum \$10,000 initiating capital, with start-up or deferred giving options available for as little as \$1,000. The capital of your donation can be invested for perpetuity, under the expert care of Vancouver Foundation's Investment Committee. The income generated will be available every year to support the charities that you care about most or any of Vancouver Foundation's Focus Areas. This is an excellent way to honour your family's name, while building healthy, vibrant and livable communities across BC. Perpetuity is forever and you can trust Vancouver Foundation to ensure that your wishes are carried out.

## Non-Permanent Fund (Transferable)

**I may not want to tie up the capital of my donation for perpetuity. I want flexibility so that it may be possible to make a large contribution to another charity in the future.**

For a minimum \$100,000 initial capital contribution, a non-permanent (transferable) fund allows discretion to recommend transfer of capital to another registered charity. There are minimum holding periods and notification requirements to consider. During the first year following the establishment of a non-permanent fund, no access to the capital is permitted. During the subsequent four years, you may request in writing to transfer up to 10% annually (not cumulative) of the market value of the fund to another CRA qualified donee. After five years, you may make a written request to transfer all or a portion of the capital in the fund. An exit fee may be applicable to cover transaction costs.

## Further Information

If you have questions, please contact Donor Services at 604.688.2204 or [info@vancouverfoundation.ca](mailto:info@vancouverfoundation.ca).