



Make a lasting difference

Canada Life Charitable Giving Program

An innovative philanthropic solution

Use the Canada Life™ Charitable Giving Program to:



Simplify charitable giving

Your gifts can be consolidated into an easy-to-maintain program. Enjoy the experience and legacy of a charitable foundation without the prohibitive cost and complexity. You can set everything up in days, instead of the months it takes with a private foundation.



Leave a legacy

Make a long-term commitment to supporting charities you believe in. Name successors to continue giving indefinitely through your heirs.



Give perpetually

Give more and give longer. Your gift can grow and give annually within a professionally managed investment portfolio.



Take control

The Canada Life Charitable Giving Program means flexibility and simplicity. You and your successors can recommend which charities will receive your gift year after year, as well as how your donation is invested.



Enjoy tax advantages

Contributions to the Canada Life Charitable Giving Program provide an immediate tax credit.



Achieving your
philanthropic
goals is important

You care about those in need
and want to give to a cause
that means a lot to you.

You want to maximize your
donations. You want to make
a difference.

Get started with these easy steps

1

Plan for a legacy.

Talk to me about setting up a donor-advised fund – your personal charitable giving program. You can establish the fund with a minimum \$10,000 donation.

2

Donate.

Establish your program with an initial donation of cash and/or a publicly traded security. You'll receive a tax receipt equal to the value of the donation.

3

Name the account.

You can name your own account – for example, John Doe might choose The Doe Family Fund.

4

Receive reporting.

Each year, the foundation advises you of the amount available to grant to charity (minimum grant required).

5

Donate to charity.

You recommend which registered Canadian charities should receive the grant.

And once the program has been established:

6

Add to the program.

You can add to your program at any time (minimum additional contribution \$500) as well as make a bequest gift in your will.

7

Continue with a successor.

You can name successors (for example, your children) who could make decisions after you die or become incapacitated.

Program details



Minimum contribution

\$10,000

Subsequent deposits

\$500



Minimum grant

\$250



Eligible assets for donation

- Cash
 - Most publicly traded securities
 - Mutual funds
 - Life insurance
 - Segregated fund policies
-



Foundation fees

- 0.55% under \$2.5 million
 - Over \$2.5 million, please contact the foundation
-

How it works

The Canada Life Charitable Giving Program is a donor-advised fund – a charitable giving vehicle that facilitates philanthropy without the administrative responsibilities or costs associated with a private foundation. The donor-advised fund is administered by a foundation (in this case, the Canada Life Charitable Giving Program).

You receive an immediate tax receipt for all contributions but retain the right to advise the foundation on how the income is allocated. When the fund is established, you name the fund and the charitable organizations or causes it supports. Over time, you can change the charities your fund supports.

The program makes giving a regular part of your overall financial security plan. It's a simple and convenient solution that gives you the ability to support your favourite charities now and in the future.

Establish your legacy to charitable giving

Make a difference to the causes you support. Let's set up a time to talk about how the Canada Life Charitable Giving Program can help you achieve your philanthropic goals. [Contact me today.](#)



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