



# GIVING. SIMPLIFIED.

The Raymond James  
Canada Foundation  
Charitable Giving Program

 A CANADIAN PRIVATE FOUNDATION

## THE POWER OF GIVING

Giving creates positive change in individuals and our communities. It is a source of inspiration and innovation, and it builds meaningful connections between generations.

Giving should be easy, but stringent tax, reporting, and governance requirements can often get in the way. Let us simplify your giving, so you can focus on making a difference.



Share the power of strategic giving and create your family legacy.

## WHO WE ARE

At the Raymond James Canada Foundation (RJCF) we are committed to helping individuals, couples, and families build legacies that last a lifetime and beyond.

We understand your passion, determination, and commitment to making the world a better place, and we can provide you with the tools to achieve your goals. As a private foundation, we can manage your giving in accordance with your wishes with discretion and confidentiality. We believe that strategic charitable giving is an essential part of a successful financial plan.

## HOW WE CAN HELP

The **Raymond James Canada Foundation's Charitable Giving Fund (CGF)** lets you seamlessly incorporate strategic giving into your overall financial plan, without the administrative burdens of running your own private foundation.

Strategic means you can reap the benefits of donating today, while creating a giving plan for tomorrow. A **Charitable Giving Fund** provides you with immediate tax benefits, the potential to grow your initial gift, and the freedom to recommend grants to qualified donees that matter to you.

## OUR CHARITABLE GIVING PROGRAM IS...

**Cost Effective:** A Charitable Giving Fund is subject to a 1% Administration Fee\*.

**Customizable:** Donors can personalize the name of the CGF, e.g. Smith Family Foundation. Opportunities are available for corporate and agency donors.

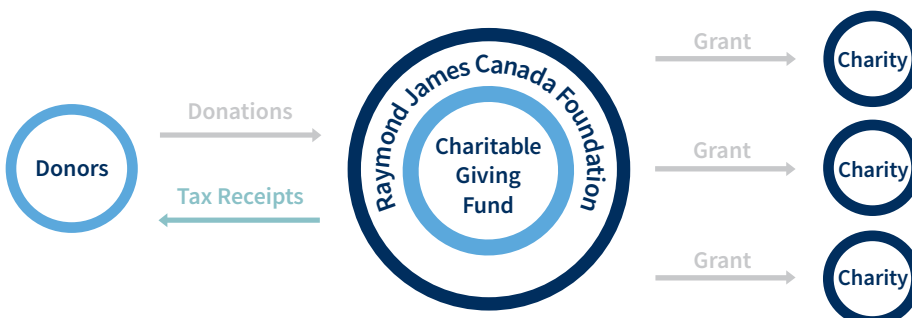
**Flexible:** CGF assets are not subject to a lock-in period. Grants to registered charities can be made from the CGF from inception.

**Simple:** A CGF can be established in as little as one week, and the Raymond James Canada Foundation takes care of all the administrative and reporting responsibilities.

**Strategic:** Donations result in tax receipts that can be used immediately or carried forward for up to 5 years. You can time your donations as part of your year-end tax planning or to reduce estate or capital gains taxes.

**Legacy-Building:** You can't live forever but your passion for helping others can. You may designate a successor to continue recommending grants from the CGF into the future. Be bold! Share your values and create your family legacy with the next generation.

## CHARITABLE GIVING PROGRAM



\*Investment management fees charged by our affiliate Raymond James Ltd. (RJL) (an investment dealer and member of the Investment Industry Regulatory Organization of Canada "IIROC") are not included in the 1% RJCF Administration Fee.



# GIVE. GROW. GRANT.

*It's that simple.*



## GIVE

A **Raymond James Canada Foundation Charitable Giving Fund** can be established with an initial irrevocable donation of at least \$100,000 in cash, liquid securities, or insurance products\*. As a donor, you receive a tax receipt which can be used immediately or carried forward up to five years. Subsequent donations can be made at any time in increments of \$10,000 or more. You can also make the **Charitable Giving Fund** a residual beneficiary of your estate, or the recipient of a bequest in your will. Consult with your Raymond James Ltd. Financial/Investment Advisor or a tax professional to find out which strategies are right for you.

\*The Raymond James Canada Foundation reviews all donations in advance to determine eligibility.



## GROW

Your Raymond James Ltd. advisor is uniquely positioned to manage your philanthropic gift alongside your existing Raymond James Ltd. investment accounts. The Foundation works with your Raymond James Ltd. Financial / Investment Advisor to invest the **Charitable Giving Fund** assets in accordance with the Raymond James Canada Foundation's investment policy statement. Our focus is on long term capital appreciation, with the goal of increasing the value of your initial gift through prudent investing.



## GRANT

The Raymond James Canada Foundation provides you with the freedom to recommend grants to your favourite charities, and receive recognition for the gifts. We can distribute grants in the name of the **Charitable Giving Fund**, or you can choose to remain anonymous. With the help of your Raymond James Financial/Investment Advisor, you can create an annual or semiannual granting plan to maximize the impact of your gift. By making a giving plan in advance you avoid the pressure of having to make snap year-end decisions. This way, income tax deadlines will not drive your charitable giving – *you will*.

Raymond James Ltd. is recognized by Imagine Canada with Caring Company Status since 2014





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