



Philanthropic Solutions

**That Are Right For Your Family
And Business**

What is the Oakville Community Foundation?

- We are Oakville's leading philanthropic solutions provider, assisting philanthropists in giving locally and across the country.
- We were founded in 1994 by a small group of Oakville residents dedicated to the future of our Town and are governed by a volunteer Board of community leaders.
- We are a trusted steward of investments, with more than \$100 million in assets.
- Our very first grant was made to fund construction of the Coronation Park Band shell in 1996 and since then we've granted more than \$40 million.
- We are the lead funder for the Oakville Heritage Trail System and Moccasin Trails, with more than 46 kilometres of public trails and growing.
- Our Community Classroom program provides Arts, Culture, and Heritage learning for every publicly funded elementary school student in Oakville.
- We use Belong Oakville to provide open doors and free activities across Oakville through many partner organizations.
- Our Youth Philanthropy initiative engages Oakville High School students in learning strategic philanthropy.
- Our Fearless Women Giving Collective engages Oakville women to share their philanthropic journey and co-invest in high-impact solutions.
- We were a founding member of the Oakville Partnership for Truth & Reconciliation and convene the Halton Granters RoundTable.



Community Foundations in Canada

The Oakville Community Foundation is the 10th largest community foundation in Canada. Oakville itself is Canada's 27th largest municipality.

The 191 Community Foundations across Canada are responsible for administering more than \$5.2 Billion in endowed assets benefiting their community, now and into the future.



Why The Oakville Community Foundation?

“Everyone has a different reason for starting a fund, but here’s what makes doing so a good idea: it’s a way to be intelligent about your finances while promoting goodwill and goodness. Even if you aren’t savvy about the local areas of need, your Community Foundation is.”

Terry Jackson, The Jackson Family Fund

“Oakville has been a second home for more than 20 years. It is a community where Jacques and I raised our son, and where I have many close friends and fond memories.

Starting a fund with the Oakville Community Foundation is a way we can say thank you and contribute on a local level.”

Susan Aglukark, Arctic Rose Foundation

“As a single widower living on my own and with financially independent children, I have the resources to offer support to Oakville, where my son and his family live; I have four grandchildren here. I am investing in their community and my son will continue the Chaudhry Family Fund when I am gone.”

Abdul Chaudhry, Chaudhry Family Fund

“Oakville’s a great place to do business, and The Foundation is a great way for us to show our appreciation.”

Stewart Budd, Budds Group of Companies

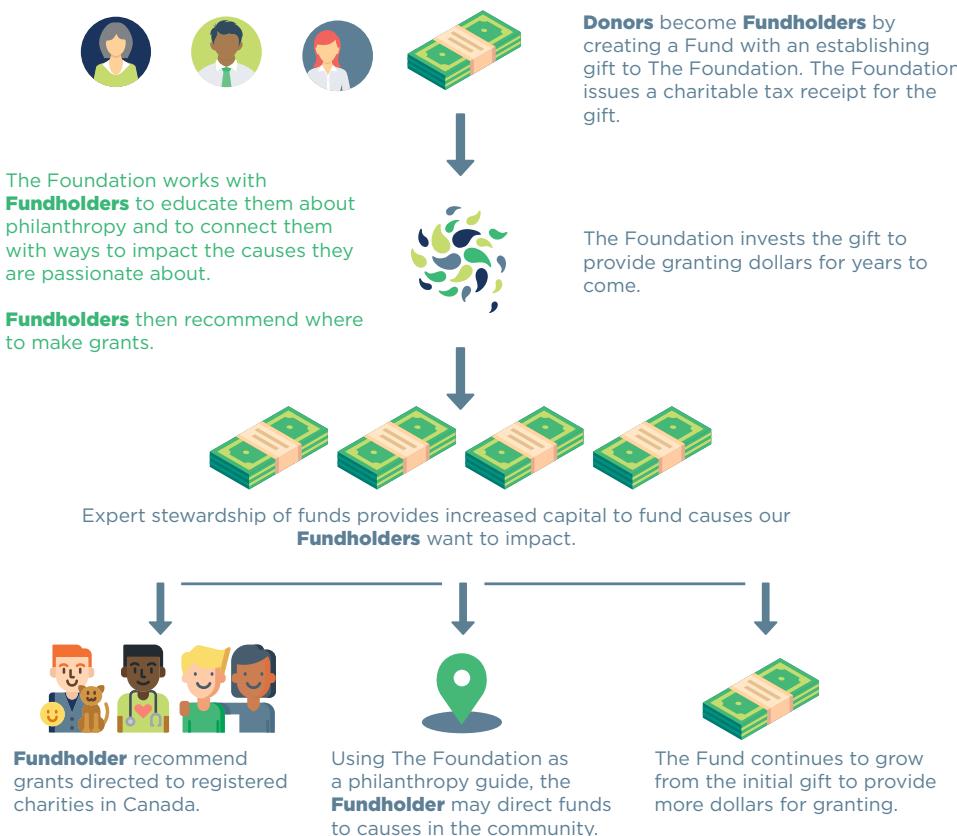
“The Foundation immediately appealed to Pauline and me because we could make one donation and spread it around to many causes. However, what we liked most was that the Community Foundation knew better than we did who was in need in Oakville and enabled us to fund causes we previously didn’t know existed.”

Don Smith,
Pauline and Don Smith Family Foundation

What does The Foundation do?

- We provide philanthropic solutions with no upfront fees for families, individuals, charities, and businesses to assist them in navigating their philanthropic journey.
- Our turnkey charitable foundation infrastructure provides investment, granting, and research to support your philanthropic vision.
- We provide a range of options for giving. Philanthropists who work with The Foundation can direct their granting to causes they are passionate about or join us as we grant based on our research of Oakville's most pressing needs.
- We host community events and connect like-minded people in a particular area of interest, with charities in need.
- When you invest your philanthropic dollars with The Foundation, you are supporting a charity working to make Oakville the best it can be.
- We can work with you to establish a philanthropic legacy that will last in perpetuity.

A simplified view of how it works:

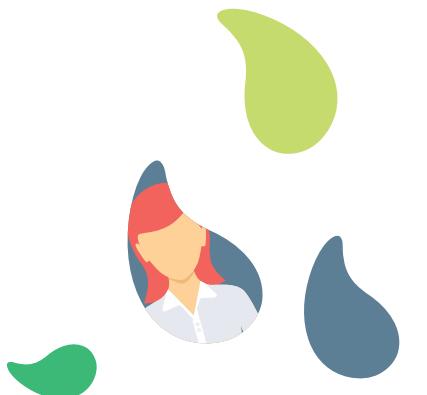


How are we able to do this?

- By providing incredible service to our Fundholders, whose Funds make up the Community Foundation's Assets.
- By working with our Investment Committee to manage Fundholder dollars for the best return.
- By providing expertise on our region's non-profits and charities as well as their challenges and assets.
- By creating programs to drive non-profit excellence, innovation, and creative solutions.
- By continually adding Fundholders to our Foundation family who believe in supporting the longterm vitality of Oakville.

How can you engage?

- Explore opportunities available to Fundholders and contact a member of our Philanthropy team for details.
- Open a Fund of any size.
- Invite us to present at your office, club, event, or with your family and friends.
- If you are a professional advisor:
 - Connect with our Philanthropy team for materials to help you discuss philanthropy with your clients
 - Refer clients interested in philanthropy to speak to us about their philanthropic goals.
- Have questions? Need more information?
Contact Sarah McPherson,
Director of Philanthropy & Communications
905 844.3562 ext. 302
sarah@theocf.org



Your Philanthropy Amplified

You are already a Philanthropist!

You contribute your time, your talent, and your treasure in so many ways. Your legacy is already being created by how you give of yourself.

The next step is a Charitable Fund for your family that can continue to support the causes you care about for generations to come. And, it's easier and more affordable than you think.

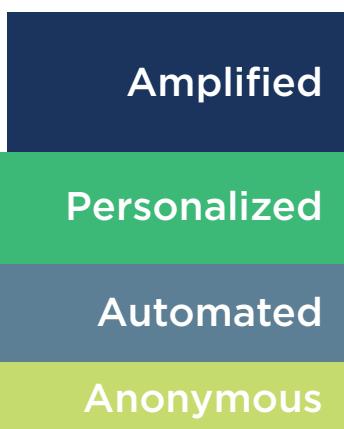
A Fund can be created with a:

- monthly giving plan**
- gift of cash or cheque**
- bequest or estate gift**
- life Insurance policy**
- RIF/RRSP**
- gift of securities**



A Charitable Fund at the Oakville Community Foundation is a connection to the charities and philanthropists making a difference here at home and beyond.

The Oakville Community Foundation currently works with more than 200 individuals, families, businesses, and charities. We can help ensure that the charitable dollars you invest are having the impact you want in the communities you care about.



Philanthropy as involved as you like.

Amplified provides the potential for Grant Matching by The Foundation.

Personalized Custom Branding, "Named" Funds, and personal web pages.

With Automated you set the priorities and we repeat your granting.

Anonymous means that The Foundation represents you in your giving. Your name is kept private.

We have **three different Fund types** available for you. No matter which one you select you will become a voting member of The Foundation and receive a tax receipt for your gift.

Endowed Fund (Long-term)

An Endowed Fund means that the capital is never spent. Over time your original gift is invested and the proceeds are granted out into the community in perpetuity. An Endowed Fund can be either a Donor Advised Fund (starting at \$20,000) or a Named Community Fund (starting at \$2,500).

With a Donor Advised Fund you are able to direct your granting dollars to any registered Canadian charity. This Fund works much like a Private Foundation and the role of Donor Advisor can be passed down to the next generation.

A Named Community Fund allows you to choose from The Foundation's list of priority Community Grants. Each option is carefully vetted to ensure the maximum impact for our community. A Named Community Fund can grow into a Donor Advised Fund by making contributions up to and above \$20,000.

Flow Through Fund (Short-term)

A Flow Through Fund is a way of making the donation now and selecting the recipients later. When you're ready you may draw the funds down by selecting registered Canadian Charities to grant to. This Fund type also allows you to take advantage of The Foundation's research to further hone your philanthropic acumen.

Bequest Fund (Family Legacy)

Create a Fund today and fund it through your estate when the time comes. It's a way of ensuring the causes you care about are supported beyond your lifetime. In addition, you can change the charities you want the Fund to support at anytime without updating your Will.

Why would I create a Fund instead of giving money directly to the charity?

To allow that original donation to grow and give back even more than your original gift to the causes you care about.



When invested with the Oakville Community Foundation, the value of your original \$20,000 gift, in 20 years, including impact and growth:

\$44,314
or 121% growth of the original gift.

Contact Sarah McPherson, Director of Philanthropy & Communications
905 844.3562 ext. 302 • sarah@theocf.org



The Foundation holds
Charitable Funds for
200+ Fundholders

Totaling assets of more than
\$100 Million

Since our inception in 1994,
we have granted
\$40 Million

More than 20 Charities
have invested their assets with
The Foundation.

More than \$10 Million
granted back to those charities from
their investments.



Building Community Through Philanthropy.

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