

January 22, 2024

Dear Fundholders,

Our 29th year ended with a strong finish. While the media was reporting donations to charities dropping, our 2023 GIVEOakville campaign grew by almost 8% over 2022 resulting in **\$740,000** granted to local charities. It achieved the second highest result in its history, second only to 2020 during the pandemic. It's impressive what our generous community can do together!

The 2023 **Investment Pool returns of 9.85%** will ensure all Fundholders and charities have sufficient funds for granting. It also set us up to celebrate our 30th Anniversary in 2024! We have an exciting year planned to bring our community together and we want you to be part of it.

Here are some of the highlights, with more to come:

1. The Foundation's **Top Administration Fee will drop by 3 basis points** on your Fund from the 2023 rate of 1.175% to 1.145% on the first \$2 million.
2. As shared in our [5-Year Impact Investment Review](#) released in October 2023, **3% of all endowed funds will be allocated to impact investing.**
3. On January 30th, The Foundation will launch its new Fundholder-requested **Community Concierge Service**— one phone extension with a direct connection to a live person!
4. Our Board is offering **30 new Fundholders a \$1,000 top-up** to their Endowed Fund. Please share the Board's offer ([attached](#)) with your friends and family.
5. Our **Board Chair Mike Miller will be matching \$1,000 for 30 Fundholders starting a \$1,000 scholarship or bursary** through the Community Education Awards Hub. More to come in February.
6. On May 30th **we will donate and plant 300 trees locally to celebrate our 30th Anniversary** and invite our community to join us. Hold the date, the details of donating and planting coming in the Spring.
7. We have already booked the **Oakville Club on Wednesday, December 4th for our Holiday Party** - Please consider this your 11-month advance notice!

So book your calendars and make plans to join in the celebrations!  
All my best for a safe and healthy 2024!

Warm regards,  
Wendy

[Check out our helpful video on How to Read Your Fund Statement.](#)