



Wealth Management
Dominion Securities

Thompson Wealth Management
RBC Dominion Securities

Creating an enduring legacy



Evan Thompson, BA
Investment and Wealth Advisor
evan.j.thompson@rbc.com
403-341-8884



Tracy Collins
Associate Wealth Advisor
tracy.collins@rbc.com
(403) 341-8863

300, 4900 - 50th Street
Red Deer, AB T4N 1X7

www.thompsonwealthmanagement.ca
1-800-663-6087

The Charitable Gift Program

Giving. It's the very essence of our humanity; a deeply personal expression of one's beliefs and life experiences.

Whether you want to help advance life-saving medical research, encourage educational efforts, sustain environmental initiatives, support the arts, or just help people in need, your charitable giving can have a real and lasting impact in your community or the world at large.

If you have been considering how to create a lasting legacy and perhaps bring your family closer together through philanthropic giving, we invite you to consider the Charitable Gift Program offered by RBC Dominion Securities.

A convenient way to create your legacy

The Charitable Gift Program provides simple, efficient and tax-effective options to help you realize your philanthropic goals meaningfully and effectively while maximizing your grant-making flexibility. You can work closely with us to help ensure your gifts complement your overall wealth management strategy and support the charitable causes you favour in ways that are effective and enduring.

Through the Charitable Gift Program, you can establish a charitable gift

fund. This fund is a charitable giving vehicle created for the purpose of managing charitable donations on behalf of an individual, family or organization. Also known as a "donor-advised" fund, a charitable gift fund offers the opportunity to create an easy-to-establish, low-cost, flexible instrument for charitable giving, that is tailored to your philanthropic goals and values as a founding donor.

You enjoy all the financial advantages and the personal satisfaction that comes with establishing your own private foundation, but without the cost and complexity. With a charitable gift fund, we enable you to focus on the pleasures of giving.

How does it work?

You make an irrevocable contribution (minimum \$25,000) to our program partner, Gift Funds Canada, to create a charitable gift fund. Gift Funds Canada is a public charitable foundation registered with the Canada Revenue Agency.

You may then recommend an investment strategy from among approved, prudent investment options or, where appropriate, develop a

custom-designed plan to match your philanthropic objectives. We handle all the investment details for even greater convenience.

When you're ready, you make grant recommendations to support your preferred charitable organizations. Our partner, the Charitable Gift Funds Canada Foundation, promotes grants to the widest possible variety of charities across Canada as long as these organizations are recognized as "qualified donees" by the Canada Revenue Agency.

In many cases, your charitable gift fund becomes a family legacy that carries on for generations.

Important benefits

When a charitable gift fund is established through the Charitable Gift Program, you:

- Receive a donation receipt for the full value of all eligible contributions
- Recommend an investment strategy for your charitable gift fund
- Recommend grants from the fund to charities of your choice and on your own timetable
- Turn over all administrative paperwork to our program partner



"Give generously but not indiscriminately. Select carefully those worthy to receive your gifts."
 – Lucius Annaeus Seneca (4 BC), Roman philosopher and statesman

Charitable Gift Program options

Classic Charitable Gift Fund			
Description	Source of funds available for grant-making	Investment policy	Initial gift
An endowed fund to satisfy long-term philanthropic objectives. The intention is to preserve gift capital for a minimum of ten years while providing a steady, annual stream of grant money for disbursement.	The Classic fund will provide money for grant-making that is calculated annually and funded from the accumulated net investment income PLUS any portion of gifts designated by the donor as "available for grant-making."	Conservative, long-term growth	\$25,000 (minimum)

Flex Charitable Gift Fund			
Description	Source of funds available for grant-making	Investment policy	Initial gift
A current fund with unlimited grant-making privileges designed to satisfy short-to-medium term philanthropic objectives.	Gift capital and accumulated net investment income may be disbursed on the recommendation of the donor/grant advisor.	Fund assets will be invested in a way that is consistent with the donor's philanthropic objectives as described in the original charitable gift fund agreement that may be updated if the objectives change.	\$100,000 (minimum)

To learn more about the Charitable Gift Program, please contact us.