

A personal approach to giving



DONOR ADVISED FUND

Creating a Donor Advised Fund *allows you to make a gift to your community foundation, then remain actively involved in suggesting uses for your gift.*

How it works

- You make a gift to Hamilton Community Foundation: cash, appreciated stocks, real estate or other assets.
- We set up a special fund in your name, the name of your family or business, or any other person, organization, or event that has meaning to you. Your fund can also be anonymous if you prefer.
- You receive tax benefits in the year your gift is made.
- With the support of the local knowledge and expertise of HCF's grantmaking team, you recommend grants from your fund to support the causes and organizations you care about most.
- Your recommendations are presented to HCF's board for approval.
- HCF handles all the administrative details and issues grants to charities in the name of your fund. (If you prefer, grants can be made anonymously).
- If you wish, your gift can be placed in an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift can be a permanent source of community capital, helping to do good work forever.

A Family's Belief in a Strong Community

Hugh and Alan Clark feel strongly about sharing their good fortune with the community. To do so, the brothers formed a private foundation in 1979 with proceeds from the sale of the Adam Clark Company Limited, the company founded by their grandfather in 1874.

Twenty years later, their foundation's value had grown tenfold, to nearly \$1 million. As the fund and grant requests grew, Hugh and Alan found administration increasingly time-consuming. As a result, they decided to turn its management over to Hamilton Community Foundation.

"For several reasons, it was natural to merge with HCF," says Alan. "We trust the Foundation." The brothers continue their relationship with the community through advice on grants made from the Clark Family Fund, a donor-advised fund at HCF.

"Alan and I have like minds," explains Hugh. "We share a concern for the social services, young people, education and the arts, and organizations or causes that have difficulty raising money."

"Everyone has a role and responsibility in creating a strong community," says Alan.



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To read more stories of donors who chose Hamilton Community Foundation, visit www.hcf.on.ca



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Hamilton Community Foundation

Our mission is to strengthen Hamilton's quality of life as an inclusive and sustainable community by acting as a catalyst and by connecting people, ideas and resources through community philanthropy.

We do this by:

- **Building resources for long-lasting solutions.** We work with donors to build funds that ensure vital futures for our community.
- **Supporting all aspects of community life.** We grant to the widest possible range of organizations and initiatives.
- **Fostering community leadership.** We bring people together from all parts of the community to stimulate new ideas, build participation and strengthen community philanthropy.

Knowledge – of philanthropy and the community – is what sets us apart.

- **We know Hamilton's long-term issues and opportunities and align donors' philanthropic interests.**
- **We create innovative solutions and partnerships to advance community goals and maximize donors' impact.**
- **We provide expert, professional, reliable, flexible services.**

Contact us:

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Donor Advised Fund

More benefits

Donor-advised funds are convenient, flexible tools for individuals, families, businesses, or groups who want to be personally involved in suggesting grants made possible by their gifts. If you have a range of community interests, a donor-advised fund may be the ideal vehicle for fulfilling your philanthropic goals. They are typically less costly and easier to administer than other forms of giving such as family or corporate foundations.

Your gift can be combined with others to increase its impact, and you can add to the fund you establish at any time, receiving tax benefits with each new gift. You can establish a fund today and make grant recommendations now or in the future. And if you endow your gift, it becomes a permanent resource for the community.

Hamilton Community Foundation was founded in 1954. Since then, HCF has made grants to our community totaling more than \$55 million. Last year, HCF granted approximately \$4.1 million to Hamilton organizations involved in health, social services, arts, environment, education and recreation.

We are part of Canada's community foundation movement, represented by more than 160 community foundations from coast to coast. Together, we help Canadians invest in building strong and resilient places to live, work and play.