

Private Giving Foundation

A simple, effective way to support the causes that matter to you.

Fall 2017



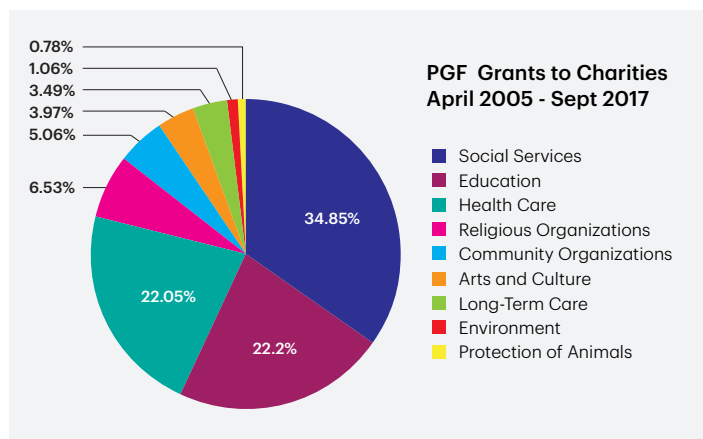
Private Giving Foundation Celebrates Generosity of Its Donors!

\$305MM in assets!

950 donor-advised accounts and growing!

\$150MM in grants paid to charities since inception!

See where your money goes:



On behalf of the PGF Board of Directors, we would like to thank you for establishing a legacy of giving to support the causes that are important to you.

Giving in Natural Disasters

It seems that we have been inundated with a flood of natural disasters around the world recently. As a result, there have been numerous appeals for donations. We have had Hurricane Harvey, Irma and Maria in the United States and the Caribbean and two devastating earthquakes in Mexico. Before that, it was the wildfires in British Columbia. We have heard charities appealing for funds on television, radio, newspaper and social media. But in some cases, it's hard to know whether a fundraising campaign is legitimate or whether the funds you donate will be used in the way you expect. Below are some tips to consider when giving in the aftermath of a natural disaster.



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- Be cautious about giving to individuals through crowd-funding. It is often difficult to determine whether those beneficiaries are the most needy or whether the money will be used for the intended purpose.
- Check Canada Revenue Agency's website to ensure the organization has a registered charity number and is in good standing.
- Look for opportunities to have your donation matched, if possible.
- Don't give items such as food or blankets. Charities are best equipped to resource what they need with cash donations.
- Look for charities that partner with other organizations to deliver goods and services that they cannot do alone.

Year-end Charitable Tax Planning Tips

It's that time of year again! December 31st is the deadline to make donations that may be claimed in the 2017 calendar year. While December is a busy month with lots of festivities centered around the holidays, we encourage you to start planning sooner than later. Here some tips:

- If you own publicly traded securities that have increased in value, you are generally better off donating them as opposed to donating cash. You will receive a donation receipt for the market value of the securities and eliminate the associated capital gains tax. If you still want to hold the stock, you may buy it back with other money and the adjusted cost base will reflect the new market value.
- If you have an insurance policy that is no longer required to fulfill your estate, business or other needs, you may want to consider donating it to a registered charity. You will receive a tax receipt for the appraised value of the policy.
- Consider leaving a bequest to your PGF account through your Will. Alternatively, consider maximizing your legacy with the purchase of life insurance. Depending on how it is structured, you may receive a donation receipt for the annual premiums year after year. For more information on these strategies, consult with your financial or tax advisor.

Carleton University MPNL Celebrates 5 Years



Carleton University approaches the 5-year anniversary of its Graduate Philanthropy and Nonprofit Leadership Program. The Master of Philanthropy and Nonprofit Leadership program (MPNL) is the only such program to exist in Canada. The MPNL produces leaders, innovators and change makers – those who want to improve the professional practice of philanthropy, lead highly effective civil society organizations and enhance public policies for this sector.

The program aims to equip these leaders and change makers so they will be capable of critical, audacious thinking, understand emerging trends and issues in the increasingly global world of philanthropy and civil society, and be able to apply their knowledge to solving real world problems.

These leaders and change makers will be capable of critical, audacious thinking...

We would like to offer our heartfelt congratulations to the 100 successful graduates of the program to date. More information about the program including registration information, is available on the website: carleton.ca/mpnl.

The Personal Philanthropy Project

The goal of Imagine Canada's Personal Philanthropy Project is to promote the message that Canadians can give – and can give more! The slow erosion of the charitable sector's donor base (as measured by those claiming their donations on their tax returns) has created a greater need for a robust giving culture now more than ever before.

Canadians of above-average means are unsure how much to give and very few, if any, have any formal plan for their charitable giving.

Canadians, and especially those with a greater capacity to give, are looking for guidance and to have meaningful conversations to help meet their financial and philanthropic goals.

One of the starting assertions for this project has been the success of Imagine Canada's Caring Companies Program. By recognizing corporate giving at or above 1% of pre-tax profits, the program has successfully cultivated corporate philanthropy. Therefore, it may be possible to achieve similar results with individual Canadians.

A game-changing outcome of this goal would see a sector-wide operating culture that exists in which organizations use more data, information, research, and knowledge to make wise decisions.

In doing so, the project endeavors to engage not only charitable sector organizations, but also those in the business community, Government and individuals. Ultimately, the goal is to engage Canadians to build stronger communities through philanthropy. For more information on this exciting project, please go to imaginecanada.ca.

Give a Charity Gift Card from *CanadaHelps* this Holiday Season



Nothing feels quite as good as giving. With a Charity Gift Card from *CanadaHelps*, it's easy to share those good feelings with someone special.

You choose the card design, the value, delivery date and can even include a personal message. *CanadaHelps* will deliver your card via email, or you can print it out and deliver it yourself.

The recipient chooses any Canadian charity they're passionate about to receive the funds. You'll also receive a charitable tax receipt and be notified when your gift is redeemed.

A Charity Gift Card is the perfect gift for any occasion: birthdays, graduations, weddings, and holidays or simply to let someone know you care. It's easy. For more information, go to canadahelps.org.

Women and Philanthropy

TD has released an addendum to its original report, "*Time, Treasure, and Talent: Canadian Women and Philanthropy*". Some highlights include:

- Total income earned by women reported in 2015 reached \$489B compared to \$421B in 2010.
- Women will be beneficiaries of an estimated \$900B over the next ten years.
- Planned giving is set to increase due to the rising wealth of women and, partially, through the fact that the Baby-Boomer generation is reaching an age when estate planning becomes a financial priority. To receive the full report, please contact joanne.ryan@td.com.



Game-changer: Canada's New Feminist Approach to Foreign Assistance Makes Canada a Global Leader

The MATCH International Women's Fund and Nobel Women's Initiative are reacting positively to International Development Minister Marie-Claude Bibeau and Global Affairs Canada for the announcement in June 2017 of \$150MM over five years for women's rights organizations in developing countries. It is the single largest investment of its kind to date from any country.

Until now, less than a percentage point of gender-based funding provided by Canada to civil society organizations around the world has reached women's rights organizations directly. In 2013, out of a total of \$562MM, women's organizations received only \$1.7MM.

"Minister Bibeau's leadership is bold and courageous and it marks an important shift in Canadian foreign policy" said Jess Tomlin, The MATCH International Women's Fund President and CEO. "We look forward to working closely with her office to ensure this new model reaches those women's rights organizations quickly and effectively—and that the funding's impact is maximized."

Canada's new feminist funding model will finally enable women leaders on the ground to be supported through flexible, non-project specific funding – allowing them to set their own agenda

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and respond where the need in their community is greatest. The funding is expected to begin flowing before fiscal year end.

The MATCH International Women's Fund
matchinternational.org

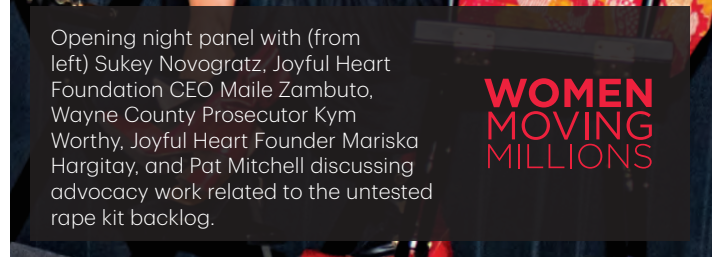
The MATCH International Women's Fund is Canada's only global fund for women, girls and transgender people. Working at the intersection of women's rights and innovation, The MATCH Fund provides direct financial support to grassroots women's rights organizations in developing countries. We fund innovative and brave creative and courageous women to dismantle barriers, challenge perceptions, and change the world for women and girls.



Women Moving Millions

TD was invited to be a major sponsor of **Women Moving Millions (WMM)** this past September. **WMM** is a philanthropic organization that brings together women globally who commit to give a minimum of \$1MM over a period of ten years to organizations supporting the advancement of women and girls.

“The Power of Community” was the theme for this year’s **Women Moving Millions** summit, with compelling stories shared by leading philanthropists and sector leaders on how to invest time, money, and expertise to move the needle for gender-lens philanthropy. You can find more about the organization at womenmovingmillions.org.



Opening night panel with (from left) Sukey Novogratz, Joyful Heart Foundation CEO Maile Zambuto, Wayne County Prosecutor Kym Worthy, Joyful Heart Founder Mariska Hargitay, and Pat Mitchell discussing advocacy work related to the untested rape kit backlog.

With Gratitude

The PGF Board of Directors would like to thank you for establishing a legacy of giving to support the causes the are important to you. Please do not hesitate to contact us if you require guidance to help reach your philanthropic goals. We would like to take this opportunity to wish you and your family a joyful holiday season.



Photo: @Greg Pacek

We welcome your questions and comments. Please direct them to joanne.ryan@td.com or call 416-308-6735.

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