



Be part of the solution.



**TORONTO COMMUNITY  
FOUNDATION**

The Art of Wise Giving™



*Fundholders Harvey and Sue Griggs*

# You could start a charitable Fund at the Toronto Community Foundation

**Becoming a Fundholder at the Toronto Community Foundation is like having your own cost effective, self directed, hassle free Foundation.**

Meet Harvey and Sue Griggs, two Torontonians who saw retirement as a chance to embark on a new challenge including doing some good in the world and their city.

They established the Griggs Family Foundation at the Toronto Community Foundation. It enables them to support both the charitable organizations they've always cared about and made-in-Toronto solutions addressing community needs.

The Griggs are just two of hundreds of like-minded people with the Toronto Community Foundation.

Find out how.



# Welcome to your Community Foundation. Here's how it works.

Setting up your Fund at the Toronto Community Foundation is easy. The first decision is NOW or LATER.

Create your Fund now to take advantage of the immediate tax benefits and begin making a difference right away. Or do it later by joining our Legacy Society and designating your Fund as a beneficiary of your estate or life insurance policy. Either way, your charitable legacy is ensured for generations to come.

Choose a Fund that meets your needs:

- **Donor Advised Fund** — You direct annual grants to charitable organizations of your choice.
- **Vital Toronto Fund** — Your gift supports the Community Foundation's endowment that makes strategic grants to high-impact initiatives in Toronto.
- **Field of Interest Fund** — You identify specific areas you care about and rely on our experience to make effective grants.
- **Designated Fund** — You designate one or more charitable organizations when your Fund is established and grant to them every year.

Your endowment can be created through gifts of marketable securities, cash, life insurance policies, RRSP/RRIF designations and bequests.

Your Fund gives you all the flexibility, involvement and recognition of a private foundation while relieving you of the "back office" and financial stewardship responsibilities. Your focus will be on creating positive change while we provide the support and services that help make it happen:

- Administrative services for accounting, audit, legal, receipting and granting.
- Compliance with Canada Revenue Agency rules.

- All regulatory filings.
- Professional investment management.

Grants may be directed to any Canada Revenue Agency registered charity operating locally, nationally, or internationally.

## Making the money work.

Responsibility for managing the Toronto Community Foundation's investment portfolio is vested in the Board of Directors with the guidance of the Investment Committee. The Committee works closely with professional staff and our investment advisors to set policy, establish performance benchmarks, and monitor the performance of the portfolio against these policies and benchmarks.

### Investment Managers and Advisors

Axiom International Investors LLC

Canso Investment Counsel Ltd.

I3 Advisors Inc.

Jarislowsky Fraser Limited

Letko, Brousseau & Associates Inc.

QV Investors Inc.

TD Asset Management Inc.

### Authorized Personal Investment Advisors

Donors may request to have their personal investment advisors manage their endowed funds. Firms must meet certain criteria. Authorized firms include:

BMO Nesbitt Burns

BMO Harris Private Banking

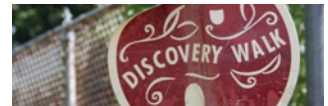
Burgundy Asset Management Ltd.

C.A. Delaney Capital Management Ltd.

Davis Rea Ltd.

Highstreet Asset Management Inc.

Manitou Investment Management Ltd.



# The Art of Wise Giving™



Everything we do is focused on generating meaningful impact. We're effective in connecting our Fundholders to inspiring opportunities that transform lives and communities.

With more than 325 endowment funds and assets under administration of more than \$250 million, the Toronto Community Foundation is one of Canada's largest public charitable foundations. Our mission is to connect philanthropy to community needs and opportunities, all with a vision to make Toronto the best place to live, work, learn and grow, through the power of giving.

We call it The Art of Wise Giving™.



## Donor Services

Fundholders can focus on their grantmaking, knowing that we take care of the "back office" requirements and financial stewardship for their Funds.

## Community Knowledge

We share our in-depth community knowledge to help donors identify Toronto's greatest needs and the charitable organizations working on the solutions.

## City Building

We make change happen by connecting Fundholders, private enterprise, governments and community partners to develop innovative responses to key quality of life issues.

You can also use your Fund to support the Vital Toronto Fund and help us tackle the city's most challenging issues.





*Beyond 3:30 participants*

# You could support the Vital Toronto Fund at the Toronto Community Foundation

Supporting the Vital Toronto Fund means you are investing in solutions to the issues identified in our Toronto's Vital Signs® Report. Sammy's story is just one example.

Meet Sammy. Halfway through Grade 7, he was placed in the "behavioural" class at his school. He was often found hanging out with the wrong kids in his neighbourhood once school ended for the day and he was developing a reputation for having a bad attitude.

His future was not looking bright – until he signed up for an innovative after-school program called Beyond 3:30. Sammy now participates in positive activities including sports, cooking, and getting homework help, all while making new friends.

Beyond 3:30 is one of several unique initiatives the Toronto Community Foundation has created with the help of numerous partners and funded through a dynamic vehicle for strategic philanthropy called the Vital Toronto Fund.



Find out how.

# So, you want to join us in making a vital Toronto. This is how we do it.

Over the past 30 years, the Vital Toronto Fund, our community endowment, has grown with the generosity of our Fundholders and donors to support the long-term vitality of Toronto. Its goal is to focus targeted solutions on some of the city's most complex issues.



"It's inspiring to be part of an organization that brings people together and is prepared to take on the toughest challenges."

– Keith Thomson, Keith, Tanja, and Kiera Thomson Fund

Our Fundholders make a difference because we do things differently, using our Community Knowledge to connect their philanthropy with not-for-profit, public and private partners to collectively build the city we all want.

## We start with Community Knowledge.

We understand that building a better city takes knowing the issues, leading the change-makers in discussions about solutions, and investing in those solutions.

Our annual **Toronto's Vital Signs® Report** identifies the trends and issues affecting the quality of life in our city. It is an important focus for public debate, as well as a valued tool for donors to understand the areas of greatest need.

Our online **Community Knowledge Centre (CKC)** connects our Fundholders and stakeholders to some of the city's most innovative organizations working on solutions to issues raised in Toronto's Vital Signs®.

The CKC brings to life the work of community organizations as they improve the quality of life in Toronto. For:

- Our family of Fundholders, it is a tool to research their giving opportunities.
- Community organizations, it is a place to tell their stories of change.
- All Torontonians, it is a place to learn about the issues and organizations providing solutions.





We take the lead in responding to the issues by investing in the best and brightest people, organizations and ideas. Our Vital Toronto Fund supports our three grant programs:

- **Vital Ideas:** Builds the capacity of high-impact programs, projects or organizations with a proven track-record of success.
- **Vital People:** Nurtures the professional development of Toronto's not-for-profit leaders, the talented and dedicated people working on Toronto's vitality and well-being.
- **Vital Youth:** Increases access to high-quality recreational programs to help youth develop leadership skills, and connect with their community.

Every year, millions of dollars in grants from our Fundholders and our Vital Toronto Fund energize hundreds of organizations.

New issues are emerging in communities across the city every day. Whether your Fund supports the Vital Toronto Fund or the organizations you already know and love, you are making a difference.

## That leads to City Building.

We bring donors together with private enterprise, governments and community partners to collaborate on breakthrough programs like:

- **Recipe for Community:** Helping inner city residents come together and build a crucial sense of belonging.
- **The Toronto Sport Leadership Program:** Equipping students in disadvantaged neighbourhoods with life-changing coaching skills.
- **Green Innovation Awards:** Connecting our donors to the trailblazers driving Toronto's 'greenaissance'.
- **Beyond 3:30:** Providing high-quality after-school programming free of charge to students in many of our city's underserved neighbourhoods.
- **Arts on Track:** Transforming the Museum Subway and re-imagining what public space can be.
- **Playing for Keeps:** Leveraging multi-sport Games to create a legacy of healthier, more active, and stronger communities.



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