



Services We Offer

Gift- Related Services

- Expertise in working with and structuring gifts such as stocks, bonds, life insurance, charitable trusts, bequests and real estate
- Assistance and ease in turning a unique asset such as art, a stamp collection or interests in a private corporation into a gift
- Information on different types of Funds you can establish at the Foundation
- Assistance in developing your philanthropic interests to focus your charitable giving
- Recognition or anonymity, according to your wishes
- Acknowledgement letters for memorial and celebratory gifts
- An attractive alternative, from a tax and cost perspective, to establishing a private foundation
- Opportunities to partner and liaise with other donors

Financial Services

- Skilled and experienced stewardship of investments by the Foundation's Investment Committee
 - Detailed and updated Statements of Investment Policy
 - Independent investment performance measurement
 - Audited financial statements of the organization
 - Periodic financial reports for individual Funds
 - Accurate and timely tax receipts*
- (*tax receipts will only be issued for donations valued at \$25.00 or higher)
- Administrative efficiencies resulting in low overhead costs
 - Expertise in the process of maximizing the benefits of gifts of stocks or other gifts-in-kind

Granting Services

- Information on major issues and opportunities in the community
- Screening of potential granting opportunities
- Connections with charitable organizations
- Innovative grant making advice
- A semi-annual list of granting opportunities from the Community Grants Program
- Information and research on the charitable sector
- Feedback on the impact of grants issued by the Foundation
- Opportunities to be part of larger initiatives
- Management of scholarships and awards