



Steps to Establish A Fund

A personalized approach to your charitable giving

Once you have decided to work with Hamilton Community Foundation, the process is quite straightforward.

Face-to-face discussion

Generally, we meet face-to-face to explore your philanthropic wishes and to develop a plan together that meets these objectives. Some of the areas for exploration and decision include the purpose for which the gift is being made, the type and amount of gift under consideration, naming the fund, the degree of involvement you wish to have in making granting decisions, the type of reporting and recognition that the donor wishes to receive.

These discussions form the basis of an understanding between you and HCF as to the terms of a gift. The terms are then drawn up as a written agreement between you and Hamilton Community Foundation.

Gift amounts

Gifts of any size are welcome and appreciated at HCF.

Certain types of funds, however, require a minimum gift to enable appropriate administration and grantmaking. In some cases you may choose to build the minimum amount required over time. When a fund is set up through periodic contributions, grantmaking will begin when the minimum balance has been achieved.

There is no minimum gift required to add to any existing fund at HCF.

Documentation to establish a fund

HCF enters into a written agreement with each donor who intends to establish a fund. This agreement sets out the purpose of the fund, the responsibilities of the Foundation and any specific requirements relative to the particular fund. The wording has been designed to meet the Canada Revenue Agency's requirements for charitable giving.

Regardless of the type of gift (during your lifetime or on death), you can be assured that your goals will be carried out forever.

Vision

A vibrant, inclusive Hamilton

Mission

To drive positive change by connecting people, ideas and resources.

What We Do

We drive positive change by:

- Helping people give in a way that has meaning to them and impact in the community.
- Supporting all aspects of community life through grants and financing to a wide range of charitable organizations and initiatives.
- Engaging in community leadership by bringing people together to address priority issues that affect Hamiltonians.

For more information, contact:

Sheree Meredith

Vice-President, Philanthropic Services
905-523-5600 ext. 246

s.meredith@hamiltoncommunityfoundation.ca

Jill Anderson

Director, Philanthropic Services
905-523-5600 ext. 254

j.anderson@hamiltoncommunityfoundation.ca

HCF Facts

Year ended March 31, 2014

- Total assets: \$155.8 million
- HCF operating expenses: 1.5% of average total assets
- Donations received: \$6.6 million
- Grants: \$6.4 million last year \$81 million since founding
- Impact investing portfolio: \$42 million
- HCF is one of more than 190 Canadian community foundations who together serve some 90 percent of Canadians

Types of funds - flexibility to meet every donor's needs

Hamilton Community Foundation manages over 300 different funds, providing tremendous flexibility and options tailored to a donor's charitable interests and goals. Broadly, the types of funds we offer are:

Community Fund/Unrestricted funds

These funds are not tied to any specific charity or area of interest by the donor; instead, donors enable the Board of Directors to determine, through research and consultation, where grants should be directed to meet the community's more pressing needs. Gifts of any amount are welcome. Donors whose accumulated endowed gifts total \$5,000 may choose to have a named fund within the Community Fund. An Arts Endowment Fund and an Environmental Endowment Fund are also options.

Field-of-interest funds

These funds allow donors to designate a specific interest area (e.g. the environment, children's need, the arts, etc.) to which grants will be made. The Board of Directors selects the most appropriate recipients year by year. The required minimum gift is \$25,000, which may be accumulated over time.

Donor-advised funds

These funds enable donors to be active in recommending the charitable organizations or programs to receive grants. The required minimum gift is \$25,000, which may be accumulated over time.

Designated funds

These funds are established to benefit specific charitable organizations named by the donor. The required minimum gift is \$10,000 for each named charitable beneficiary, which may be accumulated over time.

Agency endowment funds

Charitable organizations may establish funds at HCF to provide a source of income to carry out their work.

Scholarships and bursary funds

These funds assist and encourage students, including those challenged by education costs. The required minimum gift varies depending on the complexity of the program and the administration involved.

Administration funds

These funds support the administration of HCF's community leadership, development, grantmaking and communication programs. Gifts of any amount are welcome.

Visit hamiltoncommunityfoundation.ca for more information.

 @HamCommFdn

 HamCommFdn