



# Ways to Give

## There are many ways to make a donation or establish a fund

There are many ways to contribute to Hamilton Community Foundation. Beyond the common method of giving by cash, cheque or credit card, you can also make a donation using:

### Marketable securities

Everyone wins when you make a donation of appreciated securities to Hamilton Community Foundation.

There is no capital gains tax on shares or mutual funds that are donated to a community foundation. Many find this incentive an attractive means of making a donation – not only by contributing to their community, but in reducing taxes too.

Anyone considering a donation to HCF, and who has marketable securities that have appreciated in value, should discuss this option with their advisor.

### Donation in your will

Designate Hamilton Community Foundation as beneficiary for a specified amount or a percentage of your estate. We can provide you with sample will clauses to discuss with your lawyer.

### Life insurance

A charitable gift funded with life insurance allows you to make a large donation at death through the payment of relatively small premiums during your lifetime. You may contribute a life insurance policy currently owned or purchase a new one as a donation.

At Hamilton Community Foundation, donors of life insurance are recognized for their generosity during their lifetimes, and their decision to fund a legacy donation will likely reflect positively on surviving family members for generations.

### Hamilton Community Foundation

Hamilton Community Foundation, Ontario's first community foundation, was founded in 1954. At HCF, we link the philanthropic interests of Hamiltonians with the community's needs and opportunities.

HCF has three principal roles:

- 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:

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## HCF Facts

Year ended March 31, 2015

- Total assets: \$180 million
- HCF operating expenses: 1.3% of average total assets
- Donations received: \$12.6 million
- Grants: 561 to 227 organizations last year  
\$5.8 million last year  
\$88 million since 1954
- Impact investing commitment: \$44.9 million
- HCF is one of more than 191 Canadian community foundations who together serve some 90 percent of Canadians.



### Visit

[www.hamiltoncommunityfoundation.ca](http://www.hamiltoncommunityfoundation.ca)

for more information.

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### 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. Donations of any amount are welcome. Donors whose accumulated endowed donations total \$5,000 may choose to have a named fund within the Community Fund, the Arts Endowment Fund or Environment Endowment Fund.

#### 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 donation 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 donation 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 donation 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 donation 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. Donations of any amount are welcome.