

Giving Solutions



CHARITABLE GIVING MADE EASY FOR YOU AND YOUR CLIENT

Charitable giving is an important part of financial planning for Canadians. Lawyers, accountants and financial planners can work with Durham Community Foundation to equip themselves with the tools and knowledge to meet their client's charitable giving wishes.

Making A Difference

With more than 100 years of charitable experience, community foundations can help you build a stronger relationship with your client and make a difference in your community at the same time.

We will work with you to help your clients establish funds that reflect their individual interests while maximizing their tax savings and other financial advantages.

We offer a variety of permanent and term endowment investment options that can help your clients make a difference now, over time or in the future.

Our Advantage

Ensure Sustainable Revenue: the management of endowments is our greatest strength. Our framework addresses succession planning for many investors.

Provide Greater Return: all capital from our various funds is pooled which allows us to provide a higher return and lower fees than if funds were to be invested alone.

Eliminate Management & Reporting: we provide full administration services (including audit, receipting and reporting to CRA) for all our funds.

Enable Philanthropy: we work to support communities and build our region's philanthropic culture.

We Also Offer...

Flexibility – your client can choose the type, timing and focus of a new fund.

Engagement – your client can decide their own personal level of involvement with the fund.

Ongoing Support – we help with every step of establishing and maintaining a fund.

Peace of Mind – we pride ourselves on secure management of all our funds.

Permanence – succession planning is built into our funds.

Anonymity – for those who may desire it.

Does Your Client...

- ♥ Care deeply about their community?
- ♥ Give to more than one charitable cause?
- ♥ Discuss creating a personal or family legacy?
- ♥ Think about starting a private foundation?
- ♥ Want to stay personally involved with the use of their investment?

If so then give us a call at 905-430-6507 to find out how we can help you help your clients!