

# The Handbook on Giving

Create A Legacy... Ask Us How!

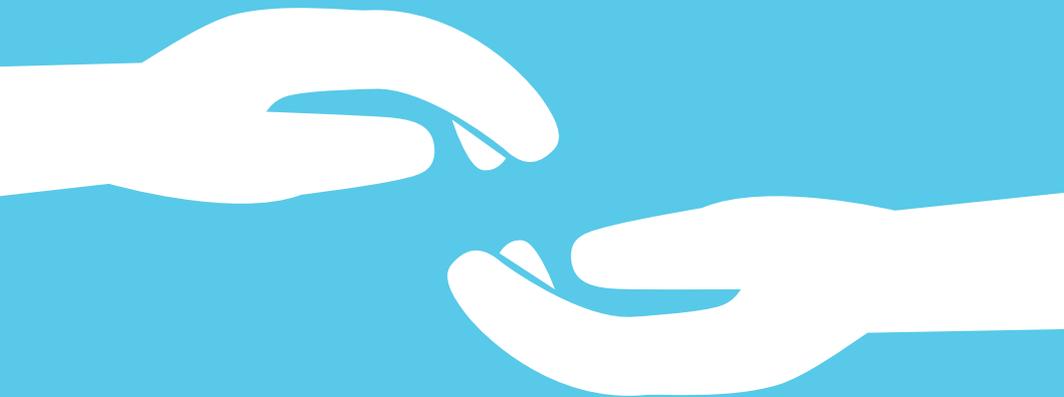


**WEST VANCOUVER  
FOUNDATION**

# The power of philanthropy.

Give back to your community now  
or leave a legacy gift for the future.

We can help you do both.

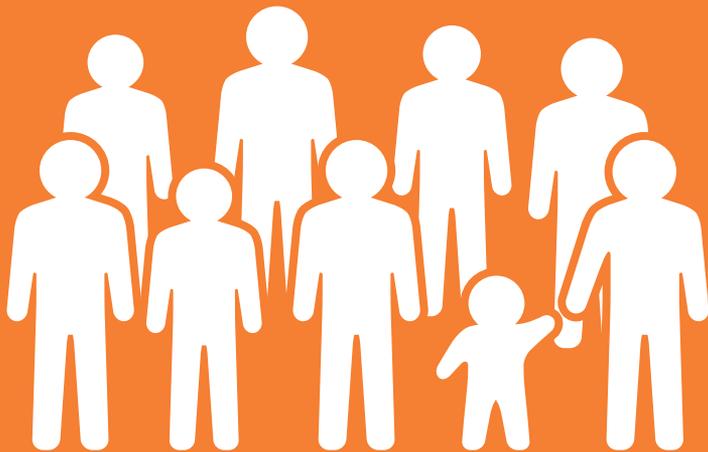


We know that each gift is a unique expression of what you care about most. It reflects your values and your hopes for the future. For some people it's an opportunity to **share a good life** with others. To give where they live and **thank a community** that has nurtured their success. For others it's an opportunity to support the things they care about most like **health and well-being, education, the arts and environmental sustainability.**

Established in 1979, the West Vancouver Foundation can help you set up a fund with flexible giving options and match your philanthropic goals with community priorities.

# If community matters,

the West Vancouver Foundation's Smart and Caring Community Fund ensures your gift is directed to the areas of greatest need.



# Your gift reflects your values and aspirations

That's why we offer flexible options that will help you set up a fund that creates the kind of community impact that you are seeking with the level of involvement that suits you best.

All of our funds allow you to focus your investment on supporting issues that interest you and have a positive impact on our community. You may choose to actively participate in how your funds are distributed, or the foundation distributes your funds through our annual grants program on your behalf.

Our donors work with us, as an alternative to setting up a private foundation because of our connections to community, and simply because it's easier administratively. A gift to an endowment fund is a gift that keeps on giving.

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## SMART AND CARING COMMUNITY FUND

Through community consultation and research, the West Vancouver Foundation's Smart and Caring Community Fund is targeted towards community needs, and annual grants from this fund shift as these needs change over time.

## DESIGNATED FUND

Allows you to name charities that you wish to support in perpetuity through annual grant payments. The fund can be named after your family, your business, or the charity itself.

## FIELD OF INTEREST FUND

This type of fund allows you to direct the income from your fund more broadly to cover a particular area of interest rather than any specific organization; e.g. arts, youth, health, education, sport, environmental conservation, etc.

## DONOR ADVISED FUND

This fund type is a popular way to give through community foundations. Similar to a private foundation, a Donor Advised Fund enables individuals and families to establish a charitable endowment fund, receive a donation tax receipt and then recommend grants over time. Grants must be made to a registered Canadian charity. This fund can be started with \$10,000 and a pledge to contribute \$10,000 each year for 5 years until the fund reaches \$50,000.

## AGENCY FUND

Your charitable organization can set up an Agency Fund with us, creating a long-term source of revenue. By pooling investments, we'll reduce your risk while optimizing returns. And we can help to grow your investment ensuring you get the most from our partnership.

# Why choose the West Vancouver Foundation?

We have been bringing donors to the table as community builders since 1979. Together we are building a vibrant and caring community.

We are proud of our reputation as a community leader and we work to bring people and projects together that create lasting impact and change.

Our vision is a healthy and vibrant West Vancouver, where everyone is valued, contributes and feels they belong.

Our funds are professionally managed and our Board of Directors bring strong governance and community leadership to the table. A Board Director chairs a volunteer grants committee, which is made up of residents with deep community knowledge.

Community foundations are uniquely positioned to help you learn about and invest in your community. Through our Vital Signs research and reports, we identify the issues in our community ensuring your gifts have lasting impact.

## GETTING STARTED

Call us at 604-925-8153 to discuss your vision and goals for giving. It's important to spend time thinking about how you want to structure your gifts.

- Is this a gift you want to make today or is it a legacy gift that you wish to make through your estate?
- If you are giving today, are you interested in supporting the foundation's Community Grants Program with a gift to the Smart and Caring Community Fund?
- Would you like to support an existing fund or would you like to set up your own fund?
- Are you interested in a specific field of interest or a particular charity?
- Would you like to be involved in grant making decisions or would you prefer to engage the expertise of the foundation's Grants Committee?

# Ways of giving:

## GIFTS OF CASH/CHEQUE

A very popular way of making a gift to West Vancouver Foundation is by cash or cheque. This is an attractive method for a donor who has cash available and who wants to make an immediate donation. West Vancouver Foundation is able to invest the donation immediately to generate income to support community projects. The donor is provided with a receipt for income tax purposes.

Cheques can be mailed and made payable to:

**West Vancouver Foundation**  
775 15th Street  
West Vancouver, BC V7T 2S9



## ON-LINE GIVING

You can make a gift on-line with your credit card at [canadahelps.org](http://canadahelps.org). Monthly giving is one of the most convenient ways you can give and you can set this up with Canadahelps.org. You can cancel at any time and you will be issued a charitable tax receipt.

## GIFTS OF APPRECIATED SECURITIES

A gift of publicly traded securities can be an attractive option. The donor will receive a tax receipt for the value of the stock at the time of transfer, and may carry forward for up to five tax years any unused portions of the gift. Please talk to a director, your professional advisor, or broker to make stock transfers easily.

## GIFTS OF LIFE INSURANCE POLICIES

Donors may name West Vancouver Foundation as the owner and beneficiary of a new or existing life insurance policy. Tax receipts are given for either the cash surrender value of an existing policy, or for premiums paid. This is one of the most popular "planned giving" vehicles. Because there are several options available, please talk to your professional advisor for help in making this gift.

## GIFTS BY WILL/BEQUEST

A donor may provide for a gift to the community in his or her will/bequest. There can be considerable tax advantages when charitable gifts are included as part of an estate plan. Please talk to a director, your lawyer, or other professional advisor to simplify the process and maximize tax advantages.

## CHARITABLE REMAINDER TRUST

A donor may place cash or property in a trust that pays annual income to you (or another beneficiary) for life. After your death, the remainder of the trust transfers to the foundation, and is placed in a charitable fund you've selected. You receive income tax benefits the year you establish your trust.

All gifts to the West Vancouver Foundation are tax deductible and we provide convenient and flexible ways for you to contribute. A charitable tax receipt will be issued for all donations over \$50.00.



**WEST VANCOUVER  
FOUNDATION**

## **West Vancouver Foundation**

**775 15th Street  
West Vancouver BC V7T 2S9**

**Charitable Business Number:  
13217 1679 RR0001**

**t: 604.925.8153**

**e: [info@westvanfoundation.ca](mailto:info@westvanfoundation.ca)**

**w: [westvanfoundation.ca](http://westvanfoundation.ca)**

**  WestVanFdn**



**COMMUNITY  
FOUNDATIONS  
OF CANADA**