

Donor Advised Funds

Donor advised funds are like charitable foundations. The donors contribute to the fund as frequently as they like and watch as their charitable investment grows tax-free.

The donors receive immediate tax benefits and can recommend donations to their favourite charities whenever they are ready.

Donor Advised Funds are ideal for those who want to set up a charitable foundation in order to be strategic in their giving and create a legacy.

Donor advised funds offer numerous benefits to donors:

1. Immediate tax benefits with a single tax receipt.
2. Anonymous gift if desired.
3. Cost savings compared to private foundations.
4. Ability to contribute appreciated securities.
5. Continued investment of contributions over time.
6. Tax-free growth.
7. Easy management of gifts and grants—someone else takes care of all the administrative work.

Gifts of Securities

At Link Charity we estimate that 90% of charities do not have a brokerage account to receive in-kind gifts of securities. In 2006 donating in this manner became the most tax efficient way of support. Link Charity handles gifts and donates to any charities of the donor's choice

The Benefits are:

- Tax savings on donated shares.
- Donor receives a charitable receipt for the full market value of the donated security.
- Demutualized life insurance company shares are most beneficially donated in kind; they are all pure capital gain.
- In-kind transfers of shares are an excellent tax saving strategy when downsizing, retiring, or for instructions in a will.

How Link Charity can help

1. If the charity to which you would like to donate a security does not have a brokerage account, Link Charity will accept the security, sell it, and give the cash proceeds to your charity. Currently, Link Charity has 9 brokerage accounts open to meet the needs of donors.
2. Once the security is transferred to Link Charity to be sold, Link Charity will distribute the proceeds to as many charities as you desire.
3. You have securities you wish to give, but you have not decided which charities should receive the proceeds or you want the proceeds to be given out over a number of years. Link Charity can fulfill both requests on your behalf.
4. You want to make an anonymous gift, but do not have a way to pass the proceeds on to the charity without being identified. By involving Link Charity in the process your gift can be made anonymously.

Why Link Charity?

Our current board chair Harry Houtman has been in the philanthropic charitable world since the mid 1970s. After decades of service in several charities, he saw a need for tools to link together donors and charities towards planned giving initiatives. The result was the creation of Link Charity Canada Inc.



Operation Mobilization Canada

84 West St., Port Colborne, ON L3K 4C8
Toll Free: +1-877-487-7777 ext. 506
Contact: Andrew Alexander
Email: andrew.alexander@om.org
Website: www.om.org



101-334 Donlands Ave., Toronto, ON M4J 3R9
Toll Free: 1-800-387-8146
Rob Ennema, CEO: 647-222-3704
Harry Houtman, MA, CFP: 416-410-4244
Email: info@linkcharity.ca
Website: www.linkcharity.ca



IN PARTNERSHIP WITH

Link Charity
Canada Inc

Gift Planning
...simplified

Want to know more?

For more information on any of the listed benefits and services, contact the Link Charity office. All inquiries and correspondence will be held in strict confidence.

Phone:

Toll Free: 1-800-387-8146
Rob Ennema, CEO: 647-222-3704
Harry Houtman, MA, CFP: 416-410-4244

Website: www.linkcharity.ca

Email: info@linkcharity.ca

Mail: 101-334 Donlands Ave.,
Toronto, ON M4J 3R9



Please send me more information on those items checked. ✓

- Charitable Gift Annuity
- Letter of Direction
- Donor Advised Funds
- Gifts of Securities

Name: _____

Address: _____

Postal Code: _____

Phone: _____

E-mail: _____

I understand from Link Charity that I will not be added to any mailing list, and my name and address will not be shared with anyone, not even Link Charity's member charities.

Date: _____



Charitable Organization Reg. # 88804 7826 RFR0001

Charitable Gift Annuity

Some 20 universities, main line denominations and others issue the self-insured gift annuity. Link Charity is one of very few which may distribute proceeds to any beneficiaries of the annuitant's choosing. This has made Link Charity a Canadian leader in issuing these agreements.



The Benefits are:

1. Guaranteed income for the rest of your life!
2. Attractive payment rates for life!
3. No management required.
4. Tax advantages – all, or most of your gift annuity income is tax exempt!
5. An immediate tax receipt of 20-25% of the capital amount.
6. Single life and joint life agreements available.
7. At the end of life, the remainder of your annuity capital becomes a gift for your favourite charities.

Letter of Direction

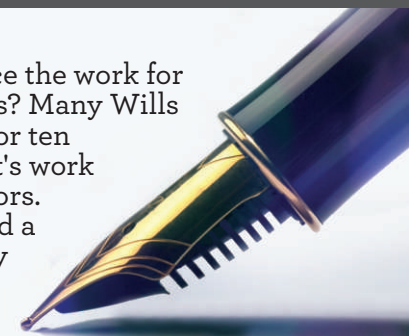
Using Link Charity as a Channel

In many ways, a Will acts as a channel for your earthly goods. Link Charity could be a useful tool when it comes to settling your estate. We offer a simple and effective solution to receive all of your charitable gifts and by distributing the total proceeds to multiple charities in one Letter of Direction outlined by you.

The Benefits are:

1. A letter of direction can be changed at any time. This is far more convenient and flexible than having the Will amended by codicils drawn up by your lawyer. Furthermore, a letter of direction could contain more instructions as to how each charity is to use its money, since these letters can be changed so readily. This allows you to target more current or more limited objectives.
2. Would you like one or more charities to receive a gift from your estate anonymously? Simply leave the gift to Link Charity with that instruction. Your estate receives the charitable receipt from Link Charity, but the recipient charity will not be informed of your identity.
3. Want more privacy? Any beneficiary that is left a percentage or a share (rather than a fixed sum) has a right not only to a copy of the full Will, but also an inventory of all the assets, and has a right to a full accounting from the executors to make sure fair value was received for all assets. Instead of many charities seeing these details, Link Charity can do all these things for you and for your family.

4. Want to reduce the work for your executors? Many Wills include eight or ten charities. That's work for the executors. Executors send a notarized copy of the Will, assets inventory, send installment cheques, and final cheques. They also have to obtain clearances and receive receipts from the multiple charities. It's more efficient to have one charity act as the channel to leave the gifts to many charities.
5. Save potentially thousands of dollars in lawyer fees by using Link Charity's letter of direction with your Will.



Link Charity

Link Charity was Federally incorporated in 1998 and in 2000 became a registered charitable organization. It operates as a valuable service, as a "LINK" between donors and their charities. Link Charity offers tools, education, programs and guidance in gift planning for individuals and for other charities. In our latest fiscal year ending June, 2020, Link Charity disbursed over \$17 million to over 860 charities across Canada.