

BUILDING STRONGER COMMUNITIES

2011 Annual Report
Brandon Area Community Foundation

MESSAGE FROM THE CHAIR

2011 was a great year for the Foundation. Our assets, programs and grants have doubled in the last five years!

The Brandon community has grown and the Foundation has grown along with it. There is a lot happening in Brandon and we were pleased to support the BU Healthy Living Center, the Brandon Family YMCA, Assiniboine Community College, the Cancer Care and the Massey Projects during the year.

The board completed a strategic plan during the year to make sure that we have reviewed and updated our strategies and direction to meet the community needs. We have increased our donor base, our asset base and most importantly, our grants. Our growth was straining our internal resources. The team of directors strives to minimize our administrative costs, but upgrades to our internal systems were necessary to properly meet our mandate.

In addition to system changes we had staffing changes. During the year we said goodbye to Karen Johnston, who has been a large part of the success of the Foundation over the last five years. We would like to publicly thank and acknowledge Karen's efforts. Patty Griffith joined the team and we welcome her to the Foundation.

We've grown a lot, have reengineered our systems and we are now ready to move full steam ahead!

Yours sincerely,
Jeanne Millis, Chair



(L-R) front row Jeanne Millis, Pat Leech, Murray MacMillan, Shari Decter-Hirst, Bob Swayze

(l-r) back row John Masson, Ron Thomas, Keay Dobson-Golletz, Ian McIntyre, Patrick Sullivan (missing) Brett McGregor

The Board would like to express their sincere gratitude to retiring Directors Keay Dobson-Golletz, Pat Leech and Ron Thomas. They are pleased to announce Barb Webber, Diana Waterman, Phil Weiss, and Brian Cottom will join the Board of Directors in May 2012.

STRENGTHENING OUR FOUNDATION

2011 brought about many changes for The Brandon Area Community Foundation. In the midst of facing unprecedented challenges presented by the investment climate, the Board of Directors stepped back and considered the future of the Foundation and what was required to ensure its growth and sustainability.

In June of 2011, Brandon Area Community Foundation established a three year strategic plan identifying the Foundation's priorities for the future and developing the strategies to achieve them. In an effort to do more than just accept gifts and make grants, BACF is embarking on strengthening its role as a community leader in the areas of impact, credibility and visibility in the communities it serves. The strategic plan identified the following areas of focus:

- reorganize operations and administration, upgrade technology to ensure security, accountability and reliability
- public relations and marketing efforts to increase awareness
- building relationships to enhance community leadership role
- commitment to creating greater benefits for the community and our donors

Work has begun on achieving these aggressive goals. Patty Griffith joined the Brandon Area Community Foundation in September of 2011 as Donor Services Manager. She joins the organization with a varied background in public relations, event management, community relations and board experience and as Donor Services Manager is responsible for all aspects of donor activity, grant processes, public relations and general operation of the Foundation. In addition, Business Administrator Tracy Skoleski joined BACF to manage the financial accountability of the Foundation. BACF is in the process of upgrading all required equipment that will provide a strong technology base on which to grow operations without impacting our ongoing operating administration costs. New public relations efforts will be incorporated which will offer an increased ability to reach the community at large providing greater support to the non-profit community, raising visibility on important needs and bringing together key players to focus on community challenges.

The Foundation has had success in establishing a strong base on which to build and strengthen our reputation as a trustworthy, well-governed organization. We look forward to the many opportunities for growth as a philanthropic leader working to build stronger communities.

This publication generously sponsored by



FINANCIAL REVIEW

STATEMENT OF FINANCIAL POSITION

	2011	2010
ASSETS		
Cash and Current Assets	\$346,919	\$1,680,341
Investments	<u>\$6,441,522</u>	<u>\$3,933,937</u>
Total Assets	<u>\$6,788,411</u>	<u>\$5,614,278</u>
LIABILITIES		
Accounts payable and accruals	\$1,850	\$37,613
Deferred revenue	\$5,000	\$5,000
Deferred contributions	\$1,503,029	\$937,446
Managed Funds	<u>\$555,723</u>	<u>\$503,148</u>
	<u>\$2,065,602</u>	<u>\$1,483,207</u>
NET ASSETS		
Endowment funds	\$4,364,137	\$3,810,778
Operating Reserve	\$74,939	\$74,979
Unrealized Gains (Losses) on "Held For Trading Assets"	<u>\$283,763</u>	<u>\$245,314</u>
	<u>\$4,722,839</u>	<u>\$4,131,071</u>
TOTAL LIABILITIES & NET ASSETS	<u>\$6,788,441</u>	<u>\$5,614,278</u>

STATEMENT OF OPERATIONS and CHANGES IN NET ASSETS

	Endowment Funds	Operating Fund	Unrealized Gains/Losses on HFT	General Administration	12/31/11 TOTALS	12/31/10 (Restated) TOTALS
REVENUES						
Fundraising event and other income				\$34,510	\$34,510	\$50,961
Investment income	\$120,124	\$2,614			\$122,738	\$106,331
	<u>\$120,124</u>	<u>\$2,614</u>		<u>\$34,510</u>	<u>\$157,248</u>	<u>\$157,292</u>
EXPENDITURES and GRANTS						
Administration				\$68,296	\$68,296	\$59,528
Fund Development				\$328	\$328	\$409
Public Relations				\$3,485	\$3,485	\$4,229
Grants disbursed	\$273,932				\$273,932	\$159,981
	<u>\$273,932</u>			<u>\$72,109</u>	<u>\$346,041</u>	<u>\$224,147</u>
Net income from operations	-\$153,808	\$2,614		-\$37,599	-\$188,793	-\$66,855
Transfers between funds	\$8,327	-\$45,926		\$37,599		
Shar of administration expenses	-\$37,653	43,272			\$5,619	\$6,071
Unrealized Gains (Losses) on "Held For Trading Assets"			\$38,449		\$38,449	\$157,250
Disbursements	-\$300,000				-\$300,000	-\$18,876
Donations, Grants & Contributed Capital	\$1,036,493				\$1,036,493	\$1,132,137
Net Change in Fund Balances	\$553,359	-\$40	\$38,449	-	\$591,768	\$1,209,727
Balance-beginning of year	\$3,810,778	\$74,979	\$245,314	-	\$4,131,071	\$2,921,344
Balance-end of year	<u>\$4,364,137</u>	<u>\$74,939</u>	<u>\$283,763</u>	<u>-</u>	<u>\$4,722,839</u>	<u>\$4,131,071</u>

The above information are excerpts from audited financial statements dated December 31, 2011 reported on by Sensus Partnership of Chartered Accountants

TREASURER'S REPORT

2011 was a strong year for the Brandon Area Community Foundation as we were able to increase our endowment funds through new capital contributions of \$860,173 while surpassing our grants record set last year to reach a new all time high granting amount of \$273,932 (including flow through grants).

Financial Highlights

- Total assets for the year were \$6,788,441, an increase of \$1,174,163 over 2010 which was a result of new capital contributions and the donation of farm land which provides a unique opportunity for the foundation in the future to have a diversified investment income stream.
- The value of the total funds owned by the BACF is \$4,722,839, an increase of \$591,768 over last year.
- BACF received generous capital contributions totaling \$860,173, including the establishment of the Green Acres Fund with an initial contribution of \$400,000. However, endowment fund contributions to the unrestricted endowment were down from last year with total contributions of \$6,088.

- Investment markets generated \$122,738 in realized investment income, an increase of \$16,407 over last year.
- Total operating costs for the organization were \$72,109, an increase of \$7,943 but remaining at approximately 1.1% of total assets.
- The operating reserve fund ended the year at \$74,939 which was after a transfer of \$8,327 to the admin endowment, and only slightly lower than the balance at the start of the year. The admin fees credited to the admin reserve for the year were \$43,272, an increase of \$7,063 as a result of an increase in endowed funds. The standard administration fee for endowment funds remained at 1% for 2011.

Overall, the Foundation had a good year and is in a strong financial position with an operating reserve of \$75,000 and admin endowment fund with a total fund value of \$47,000.

John Masson, CA
Treasurer

PROVIDING A HAND UP

Giving to a cause is most commonly linked to a personal connection or cause in a community that fosters the values of the giver. Such is the case with Dr. Frank Purdie, a loyal supporter and friend of The Brandon Area Community Foundation.

Dr. Frank Purdie speaks passionately of his life experiences growing up as the son of a country doctor in Griswold Manitoba. It is clear to see that Dr. Purdie's sense of philanthropy was nurtured through being raised by hard working parents who did what they could to make life better for others and for their community. This upbringing also defined the passion, pride and ambition that Frank brought to his career as a doctor.



Frank Purdie graduated as a medical doctor in 1944 and met his future bride, nursing sister Gwyneth ("Jonesy") Jones at Camp Borden in Ontario while he served as a medical officer in the Canadian Military. They were married in 1945 and returned to Manitoba in 1946 to start a new life together. Frank worked in Brandon as a family practitioner and later as a general surgeon and in 1961 became one of the founding doctors of the existing Brandon Medical Clinic. World travels for Frank and Jonesy followed Dr. Purdie's official retirement in 1980 but his love of medicine and helping others led him to locum work in New Zealand, filling in for surgeons in rural Manitoba hospitals and participating in hearings for the College of Physicians and Surgeons. At 92 years young, Dr. Frank Purdie still resides in the Brandon west end home that he and Gwyneth built and where they raised their three children.

In 2006, Dr. Frank Purdie established two funds with Brandon Area Community Foundation in memory of his late wife, Gwyneth Purdie, the YMCA Youth Endowment Fund in support of YMCA "at risk" youth and the Gwyneth and Frank Purdie Family Fund in support of King George School early years literacy. Both funds exemplify the late Gwyneth Purdie's love of children and reading as a hobby and learning tool that helps shape lives. A third fund, The Gwyneth and Frank Purdie Adult Literacy Fund in support of Samaritan House adult literacy programs was established in 2008. These funds all illustrate Dr. Purdie and the late Gwyneth Purdie's desire to give a "hand up", providing access to tools that will help the less fortunate build a successful future.

Many other worthwhile endeavours are the beneficiaries of the giving spirits of the Purdies and through their support of Brandon Area Community Foundation; the gifts of Frank and Gwyneth Purdie will continue to make a difference in our community for generations to come.

**DON'T MISS
WHEATSTOCK 2012**
October 25, 2012
Houston's Country Roadhouse

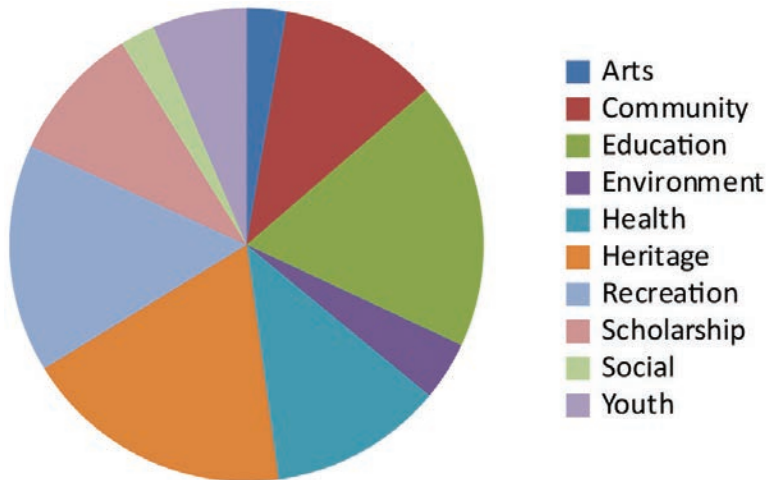


GRANTS 2011

RECIPIENT	AMOUNT
ACC Foundation	8,000
ACC Greenhouse Capital Campaign	10,000
Artists In Healthcare	2,500
Associated MB Arts Festivals Inc	1,500
Big Brothers and Sisters Brandon	500
Birdtail River Fine Arts Festival	1,000
Brandon Area Youth for Christ	400
Brandon Civic Senior Citizens Inc	500
Brandon Community Garden Network	6,000
Brandon Dance Ensemble	1,500
Brandon Literacy Council	500
Brandon Parent Child Toy Lending Library	300
Brandon School Division Friends of Education/ Ecole Harrison Playground	5,000
Brandon School Division/Friends of Education	7,500
Brandon University Foundation/ Healthy Living Project Captial Campaign	10,000
Brandon's Food for Thought Breakfast and Snack Program for Kids	300
Canadian Cancer Society	500
Canadian Cancer Society, MB Div	3,000
Canadian Diabetes Association Westman Region	500
Canadian Mental Health Assc./Massey Housing Project	7,500
Child & Family Services/ Parenting Services	400
Child & Family Services/ Preschool Enrichment Program	300
CNIB MB/Sask Division	2,500
Daly House Museum/Victoria Garden Project	10,000
Dinsdale Personal Care Home	1,350
Douglas United Church	500
Eckhardt-Gramatte National Music Competition	2,500
Elsie Taylor Memorial Scholarship	908
Family Visions	400
Forrest United Church	500
Hartney School	400
Huntington's Society	250
Jack & Evelyn Gabel Memorial Scholarship	22,831
KidSport	2,500
King George School Library	500
Lethbridge College	30,720
Manitoba Historical Society	9,000
MB Auto Museum/Elkhorn Restoration Club	1,500
Oak Lake Community School	5,000
Onanole & District Recreation Corp	1,500
Provincial Exhibition of Manitoba/ Dome Building Captial Campaign	30,000
Rapid City Regional Library	500

GRANTS 2011

RECIPIENT	AMOUNT
Riverdale District Health Auxiliary	7,500
Rivers Community Complex	10,000
Russell & Area Palliative Care	5,000
Samaritan House Ministries Inc.	500
Samaritan House Ministries Inc.	500
Samaritan House/Helping Hands	15,000
Sexuality Education Resource Centre	500
Southwest Community Options Inc.	2,000
Teen Challenge	500
The Counselling Centre	1,072
The Seton Centre	4,000
The Women's Resource Centre	1,000
Travis Crompton Scholarship	1,500
Wawanesa Telescope Project	6,000
Westman Dreams for Kids	500
Westman Immigrant Services	500
Westman Speed Skating Club	1,000
YMCA Strengthening Our Core Campaign	22,300
YMCA Strong Kids Campaign	500
YWCA	3,500
TOTAL	274,432



BACF is a proud member of



SUSTAINABLE SOLUTION

Helping students, staff and community members learn to live sustainably as a way of life has launched an innovative green project in a small community just one-half hour west of Brandon Manitoba.

The Oak Lake Community School, a K-8 community school joined an environmental citizenship program in 2010 aimed at developing student leadership and citizenship. As a result the "Push for Paperless" project was launched with a goal of reducing the amount of paper consumption by 50%, a project that involves a variety of technology-based strategies.



The School has implemented an extremely creative and innovative project that is multi-faceted. An LED (digital) sign message board is located outside the school. In addition to the paperless benefit, the message board is powered by wind energy, a truly prairie solution!

In September of 2011, Oak Lake Community School applied to The Brandon Area Community Foundation for a grant to assist with the \$14,000 LED Message Board project. BACF was thrilled to have the opportunity to support such a sustainable and collaborative project with a \$5,000 grant.

Implemented by the Community Schools Project Initiative program at Oak Lake Community School, Brenda Masson, Oak Lake Community School Principal and Kimorie Lees, Community School Connector/Teacher were supported not only by the students and staff but various community groups and individuals who also realized the long term benefits of the project. This initiative represents a true collaborative effort by the entire community.

In addition to the LED sign, the Oak Lake Community School continues to implement other technology based initiatives to reduce paper consumption including mass email lists for information distribution, increased use of SMARTBoards and projectors, electronic book readers and online systems for attendance and student records.

"Acting as agents of change, it is possible for our students and staff to take a leadership role in reducing our community's impact on the environment," states Brenda Masson, OLCS principal. "Projects like this are essential in the development of responsible environmental citizens," she added.

The message board will be used to share school and community news and information, post sustainable living reminders and strategies and eliminate the need for many notes and newsletters while promoting community involvement in sustainable living, community and recreational activities.



This initiative involving the entire community, positively impacts our environment, represents a technology based solution and youth were the driving force. Brandon Area Community Foundation congratulates Oak Lake Community School on such an innovative collaboration.

FUNDS

Field of Interest:

'97 Canada Games	\$172,250
CIBC Youth Projects	\$5,000
Buckley Family Fund	\$5,000
Cristall Family Fund	\$10,000
Environmental Unrestricted Fund	\$37,200
Stuart & Mickey Hampton Fund	\$9,000
Les Milne Memorial	\$6,950
Don & Beckie Kille Family Fund	\$10,500
Leech Family Fund.	\$15,285.50
MB. Smart Network Fund.	\$128,976
Dick & Verda McDonald Family Fund.	\$7,840
RBC Foundation Fund	\$22,500
Simplot Fund.	\$16,000
Westman Recycling Fund.	\$41,203
Wilson Memorial Fund	\$6,200
TOTAL	\$493,905

Designated:

Administration	\$13,216
Arts - Southwest	\$10,000
Arts - Midwest.	\$10,000
Arts - Daly.	\$10,000
Travis Crompton Memorial Fund	\$47,500
Diefenbaker Scholarship Fund	\$1,679
Gwyneth & Dr. Frank Purdie Fund.	\$15,000
Gwyneth & Dr. Frank Purdie Literacy Fund	\$20,000
Hartney-IOOF Scholarship Fund	\$12,000
Holden Memorial Scholarship Fund	\$40,486
Jack & Evelyn Gabel Memorial Fund.	\$725,565
Provincial Ex.of Manitoba Fund.	\$30,160
Elsie Taylor Scholarship Fund.	\$50,000
Vionell Holdings Scholarship Fund.	\$10,000
Wawanesa Cemetary Fund.	\$2,000
Gwyneth & Dr. Purdie YMCA Fund	\$20,486
TOTAL	\$1,018,093

Donor Advised:

Alice Hamnett Memorial Fund.	\$10,000
Brandon Baseball Foundation Fund.	\$10,000
Brandon Riverbank Fund.	\$84,430
Brawn/Martin Family	\$23,414

Caitlin Arksey Fund	\$31,837
Elgin Community Fund	\$36,356
Golletz Family Fund for YIP	\$36,354
Minto Community Fund	\$10,531
Murray Auto Group	\$410,000
Rapid City Community Fund.	\$53,604
Tri-High Alumni Fund	\$33,588
West.Dream for Kids fund	\$125,025
The Women's Fund	\$39,057
Dr. Harvey Bergner Fund	\$46,845
Green Acres Lodge	\$400,000
TOTAL	\$1,351,042

Unrestricted:

Mr. & Mrs. J Sexter Founders initial gift	
John & Shirley Allan Family Fund	
Anonymous	
Associated Canadian Travellers (ACT) No. 1037	
Doug & Lynne Bailey	
Estate of Anne E. & Carl S. Baker	
Rudy & Rosemarie Bidinosti Family Fund	
Binkley Family Fund	
Manse & Anna Hunt Binkley	
IMO Miss F.Goodings & Mrs.R.Blythe	
Bowslaugh Family Fund	
Walter & Jan Bradley Family Fund	
Brandon Senior Citizens	
Brandon Sun	
Randy & Elaine Brown Family Fund	
Mrs.Duncan Campbell	
Jim & Eva Campbell Family Fund	
Estate of Suzanne Cancade	
Cargill Limited	
Christie's Office Plus	
Murray & June Clark	
Clear Lake Ladies Golf Club	
Robert & Mary Clement	
J. J. Coleman Memorial Fund	
Arnold & June Cook	
Bob & Lois Cornell Family Fund	
Paul & Gail Crane	
Marion & Eric Davis	
Gloria & Merv Dillabough	

Peter Dobson Family Fund	
Donovon Stone & Co.	
Peter & Jan Eckersley Family Fund	
Estate of Colin Mailer	
Estate of Ronald Alfred James Griffin	
Mrs. Dorothy Evans In Memory Of	
Farough Family Fund	
Bryan & Sherri Ferguson Family Fund	
Reg & Clara Forbes	
Wilf & Winnie Francis Family Fund	
Gardewine & Sons Ltd.	
Tanis & Ron Hargreaves	
Hartney-Cameron Community Fund	
Bob Hawley Memorial Fund	
Helwer Family Fund	
George Hooke Memorial Fund	
Amiee & Pat Hudon Family Fund	
Les & Muriel Kille Family Fund	
Ron & Mona Kille Family Fund	
Don & Becki Kille Family Fund	
Kiwanis Club of Brandon	
Kullberg Family Fund	
Doug & Wilma Lawson Family Fund	
Glen & Eileen Lawson Family Fund	
Frank C. Lissaman Memorial Fund	
Bill & Janet Lumbard In Memory Of	
Emily Lyons	
Main Family Fund	
Manitoba Normal School-Class of '54	
Brian & Irene Martineau	
Robert & Patricia Mazer	
Dale & Grant McPhail Family Fund	
Medical Charity	
Meighen Haddad & Co.	
Muriel & Neil Merrell Family Fund	
J. Gary Mills	
Carla & Brad Milne Family Fund	
Delia & Les Milne	
Donn & Sylvia Mitchell	
Ross & Mabel Mitchell Family Fund	
Clair & Mildred Murray Family Fund	
R.F. Myers	
Wes & Suzi Norosky Family Fund	

Dr. R & N Parker	
Parobec Family Fund	
Paul's Hauling Ltd.	
Penny Family Fund	
Gord & Diane Peters Family Fund	
Charlotte & Tony Potyondy	
Estate of Fred Pratt	
Helen Riesberry	
Estate of Hazel Jean Robertson	
Vic Roseman In Memory Of	
Shepherd / Dechka Family Fund	
Don Simmons	
Simplot Canada Ltd.	
C. Snelgrove	
Ron & Sandra Thomas Family Fund	
Thomas Sill Foundation	
Mel & Ruth Turnbull	
Westoba Credit Union	
Mel & Catherine Wolfe Family Fund	
World Junior Hockey	

TOTAL \$1,377,611

Total Endowment Contributions	\$4,240,653
Fund Surplus Since Inception *	\$92,788
Market Restricted Endowments	\$30,706

Total Endowment Funds \$4,364,137

Other Gifted Assets

Gord and Diane Peters Fund	\$1,112,243
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*Fund Surplus includes the net amount of investment income less grants given and admin expense since inception.

2011 DONOR RECOGNITION

Donor Recognition

Aimee & Pat Hudon
Angela Brawn
Angelito & Cleotide Aytona
Angus Sneesby
Ann Chapman
Aynsley Helwer
Barbara Roberson
Beckie & Don Kille
Brad Munn
Brenda & Bill Pugh
Brian & Kathie McKeirnan
Cal Harrison
Catharyn Redfern
Cornelia Mellquist
David Wilson
Deb Long
Don & Beckie Kille
Don Armitage
Don & Donna Leech
Don Wrobleski
Donald & Janice Sullivan
Donald Wilson
Doug & Rachel Barkley
Dr. Frank Purdie
Dr. Harvey Bergner
Eileen Smith
Emily Constance Lyons
Ernie & Steffie Dixon
Fred Verinder
Gilda Swayze
Glen Gross
Gord & Diane Peters
Hal & Sharon Crowston
Jim Black
John Masson
Judi Janzen
Karen Elves
Keay Dobson-Golletz & Rick Golletz
Kerry Arksey
Kimberly Longstreet
Leigh Cunningham
Leslie & Svava Arksey
Louanne Reid
Donna Lowe
LuAnne Kruk
Mabel Mitchell

Marty Sexton
Millie Nykolitian
Murray MacMillan
Nora Parker
Pat Leech
Renee Robinson
Richard & Dorothy Pettinger
Richard Thomson
Robert Peel
Ron & Mona Kille
Ron & Joanne Fortin
Ron Arksey
Ron Fortin
Ron Thomas
Shari Decter Hirst
Shawna English
Shirley Ek
Terry & Catherine Arksey
Thomas & Bernice Milne
Vicki Klassen
Vivian Golletz
Zvedelina Nikolova

Corporate Donors 2011

Assiniboine Community College
Atom Jet
BDO Canada LLP
Brandon Sun
Brockie Donovan
C & C Construction
Canadian Tire
Cando Contracting
Cando Contracting Ltd.
Century 21 West-Man Realty Ltd.
Christie's Office Plus
Crane Steel Structures
D&B Sprinklers
Dick Agencies
Faders Music
Frito Lay a division of Pepsico
Guild Insurance Brokers
Houstons
Investors Group
J&G Homes
Kelleher Ford Sales
Leech Printing Ltd
Leons

Look Music Sevices
M&M Meats
MacArthur Truck & Trailer
McKenzie Seeds a division of Jiffy
Meighen Haddad LLP
MNP LLP
Montana's Cookhouse
Murray Auto Group Inc.
Pik-a-Dilly Trailer Sales
Ready Oxygen
Ted Good Music (1973) Ltd.
Terri Deller Law Office
Western Concrete
Westman Communications Goup
Westman Journal
Westoba Credit Union
Zenith Paving
Westcan Human Resource Solutions

Donor Groups

Brandon Hills Fireflies
Knox United Church
Provincial Exhibition of Manitoba
Brandon & District United Way
Green Acres Lodge
Clear Lake Ladies Golf Club
Klondike Farms
RBC Foundation
Arts Stabilization Manitoba

In Memory Of

Kayleigh Brugger
Lyle Macson
Marion Pettinger
Mary Jones
Peter Dobson

In Honor of:

The Birthday of Don Kille
The Birthday of Ron Kille
Graduation of Paulen & Maria Rocha
In honor of Bobbi & London Peters

YOUR DONATION TODAY

WILL BUILD A BETTER TOMORROW

YES, I WOULD LIKE TO DONATE

_____ name

_____ address

_____ city

_____ prov postal code

_____ telephone

_____ email

Please accept my donation of \$_____ to the Brandon Area Community Fund to be held in perpetuity.

Cheque Enclosed VISA MasterCard

_____ card no.

_____ expiry (mm/yyyy)

_____ signature

Charitable Registration Number: 89659-4884-RR0001

HOW TO MAKE A DIFFERENCE

Ways to Give

You have lots of flexibility in creating your gift. You can:

- Make an outright gift of cash, securities or property
- Provide for a bequest in your will
- Take out (or transfer) a gift of life insurance
- Set up a planned gift such as a charitable remainder trust
- Transfer an existing fund, charitable trust or endowment
- Name the Community Foundation as your designated charity through the United Way's Donor Choice Program

Establishing a Fund

When you decide to establish your own fund or support one of the Foundation's existing funds, you will join with people from all walks of life with one thing in common: the desire to make a difference in your community – forever.

Your gift will give year after year because your donation is invested as a permanent endowment fund and is managed professionally by a knowledgeable team of community leaders, staff and investment advisors.

It is simple to set up a fund. There are many ways to do it, often with significant tax benefits for you. We will work with you and your lawyer, accountant, life insurance agent or financial planner to find the approach that works best.

Visa • Mastercard • Online at canadahelps.org

Bequest by Will – A legacy of giving

Including a charitable bequest in your will is a simple way to make a lasting gift to your community. When you make this gift through your community foundation, we establish a special fund that benefits the community forever and becomes your personal legacy of giving.

Types of Funds

When you establish a fund at the Foundation, you choose its name and decide how it will work to benefit the community and fulfill your charitable goals. It could also be a tribute or memorial fund. Depending on your wishes, your fund will fall into one of the following categories:

Unrestricted Fund

This fund is the heart of the Foundation and provides flexibility in responding to community needs. Donations with a minimum cumulative value of \$1,000 may be named for an individual, family or group.

Field of Interest Fund

Donor identifies a general area of interest for fund income – named by a donor, family, group, or in memory of a loved one – minimum donation of \$5,000 to establish a fund.

Designated Fund

Donor specifies one or more charitable beneficiaries – adjustments can be made to maintain the intent of the donor – minimum contribution of \$5,000 is required to establish a fund.

Donor Advised Fund

Grants are made in accordance with the donor's wishes – recorded wishes are carried out forever by the Foundation – minimum donation of \$10,000 is required to establish this fund.

Operating Reserve Fund

Donations to this fund are utilized to defray the cost of operations.

Through the continued generosity of MNP LLP
BACF office is located at 1401 Princess Avenue, Brandon