

# Gift Planning ...*simplified*

## Link Charity

A registered charitable corporation - a valuable “link” between donors and charities, Link Charity offers guidance and gift planning products. In the latest fiscal year Link Charity distributed over \$15 million to more than 1000 qualified donees, and manages in excess of \$80 million in gift plans.



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# Donor Advised Fund

**Link** *Charity*  
Canada Inc.

## Link Charity *Donor Advised Funds*

Similar to a private foundation but without incorporation, banking, accounting, investing, CRA reporting or public scrutiny. The donor directs Link Charity to give to donor charities in the time frame, frequency and amount they choose. The fund can terminate in time, upon death, or be carried on by another generation.

### Benefits:

- Flexible; no restrictions on additions, capital retained, gifts, or accruing investment income
- Link Charity issues immediate charitable receipts on original and subsequent contributions
- Multiple donors can give to a fund - similar to a family foundation
- Charitable gifts can be sent with anonymity

### How We Help

Link Charity staff offer financial & estate planning oversight to advise on fit of a Donor Advised Fund in your planning.

Charitable assets are invested into a diverse and well - performing investment pool. Fixed return options are also available.

Periodically Link Charity provides a summary of contributions, capital, incomes and gifts made. Initial charitable intentions may be amended any time.



## Other Services and Benefits

- *Will Bequests* could name Link Charity as sole charitable beneficiary. Then via your **Letter of Direction**, Link Charity distributes proceeds to charities. This would save your estate legal and administrative efforts, time and cost.
- *Gifts of Securities* are often the easiest and most cost-effective process to set up a Donor Advised Fund - saving capital gains tax and brokerage fees.
- *Charitable Gift Annuities* ensure tax - effective life income with residual to charitable beneficiaries, outside of your estate.

For more information, go to [www.linkcharity.ca](http://www.linkcharity.ca), or call the Link Charity office. All inquiries and correspondence will be held in strict confidence.

