

Donor Advised Funds

Donor Advised Funds are like charitable foundations. You can contribute as frequently as you determine and your charitable investment grows tax-free.

Immediate tax receipts are issued. You then can direct income or capital donations through Link Charity to charities as you determine.

Donor Advised Funds are ideal for those who want to be strategic in their giving.

Donor advised funds offer numerous benefits:

- Immediate tax receipts
- Anonymity over gift direction
- Competitive growth of funds
- Tax-free growth
- Low cost management
- Administrative simplicity

Gifts of Securities

In 2006, charitable giving of appreciated securities became a very efficient way to support charities. Link Charity receives securities 'in kind', sells and distributes to charities as you direct.

Benefits Include:

- Full exemption from Capital Gains tax
- Charitable receipt for full market value of donated securities
- In-kind share transfer is an effective tax-saving strategy when downsizing, retiring or as instructions in a will

How Link Charity can help

- Link Charity receives security, sells it and directs cash to your charity(s). Brokerages help us meet requests of donors
- Securities can be sold and distributed to charities over months or years. Link Charity can fulfill both requests on your behalf
- Your gifts can be given anonymously



604-789 Don Mills Rd.
Toronto, ON. M3C 1T5
1-800-387-8146
647-435-7243
647-222-3704

Email: info@linkcharity.ca

Website: linkcharity.ca



Information and examples in this brochure current as of February 2025; connect with Link Charity, your family, finance and legal professionals for financial & estate planning integration

Gift Planning

...simplified

Want to know more?

Contact Link Charity.
Inquiries held in
confidence.

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Please send me information on

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

Name:

Address:

Postal Code:

Phone:

E-mail:

Link Charity will not add your name to
marketing, nor share information with
other charities without consent.

Date:

Charitable Gift Annuity

Tax-preferred income for
life; residual to chosen
charities. Link Charity is a
Charitable Annuity leader.



Benefits Include:

- Regular income for life
- Single & joint life agreements
- No management required
- Immediate tax receipt of 20-25% of capital
- Tax advantages - all or most annuity income is tax exempt
- Remainder designated to charity

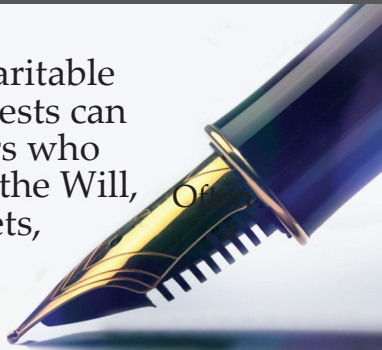
Letter of Direction

A Last Will and Testament
provides direction for your
assets. Link Charity
provides efficient, effective
services to settle your
estate. If you designate
Link Charity in your will,
our team can receive your
charitable gift and
distribute proceeds to
multiple charities outlined
in a Letter of Direction.

Benefits Include:

- FLEXIBILITY: A Letter of Direction can be changed any time; a convenient way to amend plans. Stored with Link Charity, it can contain instructions to charity.
- ANONYMITY: We distribute gifts to your charities as directed and provide one tax receipt for Executor.
- PRIVACY: Beneficiaries of percentage or share have a right to a copy of the Will, inventory of assets and full accounting. Instead of many charities seeing these details, Link Charity can manage these things for you, then your family.

- EASE: Many charitable beneficiary requests can burden executors who seek to notarize the Will, detail & sell assets, and distribute, among many other tasks. Link Charity can channel gifts to many charities.
- EFFICIENCY: A well drafted Will - updated as required, with a Letter of Direction at Link Charity reduces legal fees.



Link Charity

Founder Harry Houtman - after decades in the charitable sector, recognized need for tools to link donors and charities. The result was Link Charity Canada Inc. a registered charitable organization, in 2000.

Our team offers tools, education, programs and guidance in gift planning for individuals and for charities. Since 2000 Link Charity has distributed millions in gifts to 1000's of charities across Canada