

DONOR ADVISED FUNDS

you have a voice



Establishing a Donor Advised Fund allows you to make a gift to the Ontario 4-H Foundation and then remain actively involved in suggesting uses for your gift.

HERE'S HOW IT WORKS

- You make a gift today to the Ontario 4-H Foundation – you can give cash, appreciated stocks, real estate, or other assets.
- Your gift is placed in an endowed fund that is carefully invested and can grow over time.
- We set up a special fund in your name, in the name of your family or business or in honour of any person or organization you choose.
- You, as the donor receives tax benefits the year the gift is made.
- You recommend uses for your fund each year– working with the Ontario 4-H Foundation staff to support the 4-H programs, opportunities, or needs which you care about.
- Your recommendations are presented to the Ontario 4-H Foundation Board of Trustees for approval.
- We handle all the administrative details and issue the grant award(s) as per your Board Approved recommendation, in the name of your fund (if you prefer, your awards can be made anonymously).

Example:

A dairy farm family had reached a point in their business that they were financially secure. With their family's needs cared for, their goal was to create a lasting legacy to benefit their community. Wanting to focus on leadership development within youth, the family chose the Ontario 4-H Foundation to build their legacy.

The family wanted to be actively involved in the direction of the grants resulting from their funds every year. This led to a cash donation to the Ontario 4-H Foundation Endowment Fund and to the establishment of a Donor Advised Fund in their name. Each year, the family meets with staff of the Ontario 4-H Foundation to discuss and review their goals for direction of their fund's grant(s) for that year. One year, for example, they wanted to ensure their county's 4-H dairy members could experience the learning, fun and friendship opportunities that come from participating in a national show. That year's grant went to covering part of the team's costs and in particular that of one 4-H member who needed "angel funding" to enable her to go.

As the years went by, the family continued to contribute to their fund as they worked with the advice of their accountant and financial planner. With the fund growth, came the opportunity for the family to expand their granting efforts. They started to fund a judging school for their local 4-H Association lead by well known judging clinicians and sent the top three members from that day to a national competition. They hope one day to take the school to a regional level!

The founders' involvement in directing grant decisions was transferred to their children in later years, and in so doing they instilled in their children the great feeling that comes from investing in your own community. The family fund has never quit growing and giving. It won't be long before the grandchildren of the founding family are involved in continuing the "building of the family's legacy to their community" through 4-H dairy youth members. At any time the family may request that the Foundation take over direction of their fund if that need arises.

Perhaps your family relates to this example of legacy building. Talk with the Ontario 4-H Foundation today about the possibilities.



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