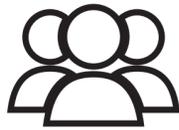


# Establishing a Fund

## 1 Donor

Individual  
or Family



Company  
or Business



Charity or Community  
Organization



## 2 Gift Options

Cash  
Donation



Life  
Insurance



Bequest



Public  
Securities



Retirement  
Funds



Advisor  
Managed  
Funds



## 3 Choose Your Fund Type

See reverse  
page for more  
details

Community  
Fund

Designated  
Fund

Field of  
Interest  
Fund

Donor  
Advised

Scholarship  
Fund

CFSEA  
Operations  
Fund

Rural  
Community  
Fund

Agency  
Fund

### Due Diligence

CFSEA utilizes Vital Events to determine current community needs. Grant applications are submitted by local charities which are reviewed by a committee to determine successful grant requests.

### Direct Donor Advice

CFSEA connects with fund holders annually as to which charitable organization(s) they would like to support.

### Rural Community Fund Options

Rural Community Funds allow donors to "give where they live" to support the charitable needs in their specific geographical region.

## 4 Donor Recognition

CFSEA works with donors to help guide them through their philanthropic journey. Donors are welcome to share their story to be featured digitally and through various publications. They are invited to annual grant presentations, Vital Events, and other celebrations.

Note: CFSEA handles all the administrative details and issues grants to charities in the name of your established fund.

Learn more about how you can contribute to a vibrant, healthy, caring community at [cfsea.ca](http://cfsea.ca) or by calling 403.527.9038

# Types of Endowment Funds

**Community Fund:**

Community Funds respond to the ever-changing needs of our region now and for generations to come. Investment income is distributed through an application-based granting process.

**Minimum gift of \$1,000**

**Youth Endowment Fund:**

Support the Youth in Philanthropy (YiP) program where students learn about community needs and charities that address those needs. Students experience the granting and giving process and select the charitable recipients.

**Minimum gift of \$1,000**

**Designated Fund:**

Each year the investment income will be dispersed to your favourite, chosen charitable organization(s).

**Minimum gift of \$5,000**

**Field of Interest Fund:**

Support your charitable areas of interest, while still responding to our region's greatest needs. Examples of Field of Interest include arts, youth, seniors, health, environment, etc. CFSEA directs investment income to specific charities that deliver services in the donor's chosen field(s) through an application-based granting process.

**Minimum gift of \$10,000**

**Donor Advised Fund:**

Donors advise CFSEA each year as to which charitable organization(s) are to benefit from the investment income from their fund. Donor Advised Funds allow the donor to change their philanthropic focus each year.

**Minimum gift of \$15,000**

**Scholarship Fund:**

Support students in their educational pursuits. Donors determine the scholarship criteria and specific school district(s). CFSEA issues the scholarship amount annually to that school district(s). The school district in turn selects the recipients based on the donor's criteria.

**Minimum gift of \$15,000**

**Agency Fund:**

Investment income from their permanently endowed funds are issued back to the agency.

**Minimum gift of \$5,000**

**Advisor Managed Endowment Fund:**

Donors can work with their investment advisor to establish an endowment with CFSEA to benefit the charity(s) of their choice. This partnership provides donors the opportunity to choose their own advisor.

**Minimum gift of \$200,000**

**Spend Down Fund:**

The capital is invested, with the intent to grant the entire amount in agreed-upon intervals until it is fully depleted.

**Minimum gift of \$10,000**

**Rural Community Funds: Give Where You Live**

- **Brooks & District Community Fund:** Encompassing Brooks and the County of Newell
- **Rural Community Fund of Forty Mile:** Encompassing the County of Forty Mile No. 8
- **Prairie Crocus Community Fund:** Encompassing Special Areas 2, 3, 4, and the MD of Acadia
- **Cypress County Community Fund:** Encompassing Cypress County

**CFSEA Operations Endowment Fund:**

CFSEA has ensured its ongoing administrative operations with the establishment of a specific Endowment Fund. We invite every donor to consider allocating a portion of their gifts to the sustainability of the Foundation (eg. 5-10%).