

Telelearning Workshop - Giving from the Heart

Thank you for welcoming me and for the care you bring to your community. Whether you serve at a club, a church, a hall or a local board, the way you give your time is a gift in itself. This summary pulls together what we talked about so you can read it again at your own pace, share it with family, and decide what feels right for you.

Warmly, Frances Meyer, Philanthropic Advisor at the Saskatoon Community Foundation

Why legacy giving matters now

- **Giving is changing.** Many people are moving from one-time donations to gifts with a clear purpose.
- **Families are asking bigger questions.** Not only “how much will I leave?” but “what will my giving say about what I valued?”
- **Your community is counting on it.** Small towns and rural areas rely on neighbours who give, now and in the years ahead.

About the Saskatoon Community Foundation

We are a public charitable foundation. We connect people who care with causes that matter, and we look after gifts, so they help local charities year after year. Gifts are invested, and the returns pay out as grants, so your gift keeps giving.

1970

Year founded

\$115M+

Assets under stewardship

\$7.53M+

Granted each year

500+

Active funds

Simple ways to give

Cash

The easiest place to start. A gift today, with a tax receipt.

A gift in your will

Leave a set amount or a share of your estate. It costs you nothing now.

Stocks and mutual funds

Giving the shares themselves can often avoid capital gains tax and still earns a full receipt.

RRSP / RRIF

Name SCF as a beneficiary. This can reduce the tax your estate pays.

A gift in your will, in plain words

Sample wording only

I give to the Saskatoon Community Foundation (Business Number 119140911RR0001) [the sum of \$____ / ____% of the residue of my estate], to be held in a fund named _____ for the benefit of the Saskatoon community.

Please have your lawyer confirm the wording for your own will. I am happy to work alongside them.

Six ways to set up a fund

Donor Advised Fund Our most popular. Give, receive an immediate tax receipt, and you choose which charities receive grants each year.	Designated Fund An endowed fund that is set up to support one or more specific charities the donor cares about, now and forever.	Field of Interest Fund Supports a broad area such as health, arts or youth. We find the best organizations.
Scholarship Fund A named scholarship that helps local students for generations.	Community Fund Grants go to Saskatoon's greatest needs, guided by our community research.	Donor Advised Spendable Fund Very flexible. You decide where gifts go, when, and how much.

We also support other charitable organizations with Managed Funds. A professionally managed investment fund for charitable organizations that wish to benefit from the Foundation's investment management while retaining ownership of their assets. Minimum \$100,000.

A fund built by neighbours

Picture a service club in a small town. Each year the members raise money for local projects. They decide to start a fund at SCF so that the work carries on long after today's members. Everyone gives what they can, and the fund grows. Every year, grants go back to their own town: the hall, the rink, the library. *This is an illustration, not a specific SCF fund.* Collective giving works. Through our GiveYXE, people who thought they had too little to matter have raised over \$3.8 million together.

Questions to take home

- What do you want your gift to do?
- What causes and places matter most to you?
- Would your family know your charitable wishes?
- What would you like to be remembered for in your community?

What to expect when we talk

A conversation About your priorities. No pressure.	Clear options You choose what suits you and your family.	Plain answers On investments and fees.	Your team We include your advisor or lawyer when you wish.
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Let's talk. One conversation, no obligation.

I would be glad to meet with you or your club, in person or by phone.

Frances Meyer, Philanthropic Advisor

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This summary is general information and is not legal, tax or financial advice. Please speak with your own lawyer, accountant or financial advisor before making decisions about your estate or gifts.