

Endowment Funds



A charitable endowment fund is a gift that keeps on giving.

Each donation made to an endowment fund will be invested in perpetuity, and only income earned on investments will be distributed each year by the Montreal Children's Hospital Foundation to help answer the hospital's needs.

You may donate to an existing fund at the Foundation or you may establish your own endowment fund which will bear the name of your choosing. This fund might honour the memory of a loved one, pay tribute to someone close to you or carry on your family name or the name of your child. If you prefer, your fund can simply be established in your own name.

Ideally, your fund will help respond to the Hospital's most urgent needs or the needs of one of its departments. You may also designate a more specific use for your fund, such as to help advance research, care, equipment purchases or teaching.

What donations can be made to an endowment fund?

All donations can be added to your endowment fund, whether they are immediate or future donations.

Family members, friends, colleagues, people in your community or anyone close to you can contribute to

your fund at any time to commemorate important events such as birthdays, graduations, retirement, bar/bat mitzvahs, holidays, weddings or births. Together, you can help your fund grow and increase the amount donated each year in the name of children's health.

What about tax credits?

Each time a donation is made to your fund, the Foundation will issue a tax receipt to the donor (or estate), of which the credit can reduce taxes owing on revenue.

Note: A minimum donation is required to establish an endowment fund which our advisors will discuss with you at your first meeting. The Foundation's board of directors has established an investment committee that conducts ongoing reviews to ensure that all capital is invested and managed with prudence while respecting the Foundation's investment policy.

Please seek expert advice:

Depending on the type of gift you choose to create your fund, we strongly recommend that you seek professional financial, insurance and/or legal advice to ensure that your financial goals are considered, your tax situation is reviewed, and your legacy gift is tailored to your circumstances.

Dr. MacKenzie Forbes Society

The Montreal Children's Hospital Foundation is pleased to recognize individuals who establish an endowment fund or include the Foundation in their estate plans. The Dr. MacKenzie Forbes Society is a group of thoughtful and visionary donors who have demonstrated generosity and concern for children of today and tomorrow.

When you become a member, you enjoy the benefits of the Society and receive:

- ✓ An invitation to visit the hospital for a behind the scenes tour
- ✓ An invitation to our Annual Recognition Event
- ✓ Your name(s) on the Annual Donors List on the Foundation website
- ✓ Your name will be displayed on the Dr. MacKenzie Forbes Society Wall in perpetuity, for gifts received of \$100,000 and more

For further information, please contact **Samar El Soufi**, Planning and Development Officer

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la fondation
de l'hôpital
de montréal
pour enfants
the montreal
children's
hospital
foundation

