

Cash/Credit Card Gift Form



This is who I am/we are:

Mr. Mrs. Ms. Dr. Mr. & Mrs.

Donor's Name (required -that will appear on tax receipt, if you are a couple, please provide both names)

Address (required)

City

Province

Postal Code

Phone Number (home)

Phone Number (work)

Email

I/we have previously donated to The Calgary Foundation

F.I.M.S. ID: (for office use only): _____

I/we would like my/our donation to go to the following fund (please select one option):

OPTION 1: THE CALGARY FOUNDATION COMMUNITY FUND

Grants from this fund support projects and activities that help make our community stronger and more vibrant and which increase citizen engagement. The Community Grants Program supports innovative projects and emerging needs that will change over time as communities in Calgary and surrounding areas evolve. Applications from charities for project funding through the Community Grants Program are accepted twice a year, and granting decisions are made by the Foundation's Board of Directors in consultation with volunteer advisory groups.

OPTION 2: FIELD OF INTEREST FUND

Donors with an interest in a certain charitable sector are invited to choose one of the following Calgary Foundation Field of Interest Funds. Grants from these funds are made to Calgary and area charities through the Community Grants Program.

Environment Fund: Supports the protection, preservation, enhancement and restoration of the physical environment.

Senior Fund: Supports enriching the lives of seniors and learning from their experience and expertise.

Mental Health Fund: Supports the study, research and treatment of mental, nervous and emotional disorders.

Arts & Heritage Fund: Supports and celebrates creativity and history, interpreting the past and forging links to contemporary discussions.

Diversity & Inclusion Fund: Supports valuing all people equally and treating all people with respect.

OPTION 3: EXISTING FUND

This donation is to go to the _____ **Fund** (please complete with fund name), which is a fund that currently exists at The Calgary Foundation.

OPTION 4: NEW FUND

My/our donation is \$5,000 or more and I/we would like to create a new fund. Please have someone contact me/us to discuss my/our philanthropic goals and the type of fund I/we would like to start.

Please see over → → →

My/our donation is a gift by:

- Cheque in the amount of \$_____ (please make payable to The Calgary Foundation)
- Cash in the amount of \$_____
- Credit Card: (i) A **one-time donation** in the amount of \$_____

(ii) Monthly donations: I authorize The Calgary Foundation to process a monthly donation in the amount of \$_____ on the 1st day of every month. I understand that I may change the amount of this automatic donation, or cancel it, upon 30 days' written notice.

Visa MasterCard Card # _____

Expiry Date: _____ Name on card: _____

Signature _____

A charitable tax receipt will be issued to the person/s on whose account the cheque is drawn, or to the person whose name appears on the credit card.

If you wish to donate publicly listed securities, life insurance or other type of asset, please contact a member of The Calgary Foundation Fund Development staff at (403) 802-7700 or email us at donations@thecalgaryfoundation.org.

PERMISSION TO INVEST THIS GIFT AS AN ENDOWMENT FUND

The primary goal of a community foundation is to create, manage and build permanent funding for the support of charitable organizations and projects now and forever (in perpetuity). This objective requires donations be held in permanent endowment funds with an annual disbursement of investment earnings through grants. The grant amounts are controlled to protect the long-term value of each fund.

Canada Revenue Agency requires that written direction (permission) be obtained from each donor to allow the investment of the donated capital on a long-term basis to build permanent endowment funds. The fund to which you have directed your donation is a permanent endowment fund requiring this direction.

If the donor does not provide this written direction, The Calgary foundation must spend a minimum of 80% of receipted donations in the fiscal year received or in the following fiscal year. Currently, grants are annually limited to the equivalent of 5% of the annual market value of each fund. All other investment earnings, net of administration expenses (approximately 1%) are retained and reinvested in the fund. This fund capital preservation policy is subject to periodic review by The Calgary Foundation Board of Directors.

Please sign here to direct that the gift you are making is to be held in perpetuity.

Donor/s Signature/s

Date

Purpose of donation (e.g. Memorial, congratulations, specific info. etc.)

Thank you for supporting the community with a gift through The Calgary Foundation

The Calgary Foundation
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