

WHITE LABEL BROCHURE | ONTARIO ARTS FOUNDATION

Planned Giving “White Label” brochure for arts organizations holding an endowment with the Ontario Arts Foundation

The purpose of this marketing communication is to provide general information to current/future donors about planned giving, endowment gifts and the endowment fund you hold with the Ontario Arts Foundation.

The cover/title page should be designed to reflect your current marketing and promotion materials and on the closing page, provide your contact information. The inside pages describe planned giving/legacy gifts and how your arts endowment fund is managed by the Foundation.

Cover Page

Unique to the arts organization

Title options you might consider:

Creating a Legacy

Creating a Legacy of Support for ... *your name*

Legacy Giving ... *your name*

You can choose between a vertical and landscape orientation. If you have existing materials, the look will remain consistent. We recommend you consult with the designer you currently use to develop a layout that best works for your organization.

You may have an existing tag or brand line you can incorporate in the title.



Planned Giving | Endowment Gift

Creating Your Legacy

For 00 years, Xyzzyz Organization has been a place to come together in our vibrant community. Our programs are only possible with the help of our donors. Your support brings our mission to reality.

For many friends of Xyzzyz, a planned gift illustrates their commitment to Xyzzyz's programs and to providing our organization with stability and continuity. These gifts are a means for you to support Xyzzyz now, or through your estate later on.

Planned gifts can be an important part of your personal tax and estate planning and involve:

- Making a bequest in your Will leaving a fixed amount, or pre-determined share of your estate to Xyzzyz
- Contributing to Xyzzyz Arts Endowment Fund to help in providing valuable operating income
- Establishing an endowed fund with a well-defined purpose that may include scholarships for artists, or Xyzzyz outreach programs, for example.

Planned gifts can reflect your personal situation, and are a **tax effective** way of giving to Xyzzyz. Your gift will continue to enhance lives even after you are gone. It will be invested, through the Ontario Arts Foundation, to create a steady, secure source of income for Xyzzyz and a gift that will last forever.

Tax Advantages

Gifts to Xyzzyz during your lifetime or through your Will, may offer significant tax benefits. For example, a bequest through your estate will be 100% tax deductible as a charitable donation, reducing taxes owed by your estate.

How to Give

We can help you identify options that work best for you.

There are a number of ways to make a planned gift—a bequest in your Will, a gift of life insurance, proceeds of your Retirement Savings Plan (RSP) or Retirement Income Fund (RIF), a gift of securities, or a charitable annuity/remainder trust. You can also contribute to the Xyzzyz Arts Endowment Fund to build an investment, an enduring gift that generates income to support Xyzzyz.

Endowment Gifts

Arts Endowment Fund

Since 0000, Xyzyz has benefited from Xyzyz Arts Endowment Fund established with the Ontario Arts Foundation, resulting in annual income that supports our programs and operations.

Endowment funds receive gifts that are intended for the long — supporting the operations of Xyzyz for years to come. They are invested so that while the capital grows, its value is preserved against inflation and a steady annual stream of income is paid each year to Xyzyz.

About the Ontario Arts Foundation

Since 1991, the Ontario Arts Foundation, an independent public foundation, has managed endowment funds to support the arts in Ontario. The Foundation works closely with Xyzyz and our patrons to attract endowment gifts, ensure those gifts can be matched through government programs and effectively administer their gifts, now and in years to come.

The Foundation benefits patrons and artists with its proven knowledge of both arts philanthropy and financial management in ensuring cost effective gift safekeeping and administration.

How the Ontario Arts Foundation Manages Endowments

When a fund is created with the Ontario Arts Foundation, the Foundation assumes responsibility for investing the fund. The Board of Directors establishes an investment strategy for arts organizations and ensures the funds are invested wisely with leading Canadian investment managers. As capital grows over time, annual income payouts increase proportionately. Consistent, positive returns allow the Foundation to make sustained income distributions in a range of 3 to 5 %. Five year investment returns are 11%.

All funds are pooled for investment purposes and managed by:

Burgundy Asset Management (equity, fixed income)

Turtle Creek Asset Management (equity)

Gluskin, Sheff Asset Management (alternative/fixed income)

An endowment fund, managed by the Ontario Arts Foundation provides Xyzyz and its patrons/donors with a means to:

- Deepen their relationship with us and be recognized as key supporters
- Establish long term relationships with new donors
- Create the opportunity for sustained financial support in the future

How to make a lasting impact

For more information about how to make a lasting impact on XYZYZ:

- Leaving a gift in your Will
- Honoring a friend or family member through a memorial gift
- Making a tax planned gift of securities, life insurance or other asset
- If you have included XYZYZ in your Will, please allow us to thank you and recognize your gift

Please contact:

XYZYZ name

Address and phone number

www.xyzyz.com

Note: when making estate plans and changes to your Will, you should consult with your own professional legal/tax advisor(s).

For information about the Ontario Arts Foundation:

www.ontarioartsfoundation.on.ca

Your personal philanthropy will inspire others to join you in creating a legacy of support for XYZYZ/the arts.

The arts, and the mission of XYZYZ are fundamental to the ongoing health and vibrancy of our community and society.

“Placeholder text. When a fund is created with the Ontario Arts Foundation, the Foundation assumes responsibility for investing the fund. The Board of Directors establishes an investment strategy for arts organizations and ensures the funds are invested wisely with leading Canadian investment managers.”

— [placeholder for testimonial writer’s name]