

Charitable Investment Account fees



Charitable Impact charges a fee determined by the balance of the Charitable Investment Account. Our fee is charged in addition to any fees charged directly by financial advisors.

Fees do not impact the tax receipt, which is determined by the fair market value of the assets at the time of donation.

Account balance	Annual fee
First \$1,000,000	0.50%
Assets above first \$1,000,000	0.25%
Total assets above \$5,000,000	Contact Charitable Impact for details

Our fee is collected quarterly and is based on the average of the opening and closing market value of the Charitable Investment Account balance each quarter.

Contact us for specific information about fees for donations of private company shares, real estate, and life insurance.

Good to know

Charitable Impact operates as a donor-advised fund and offers full-service giving support.

We're governed by CHIMP: Charitable Impact Foundation (Canada), a charity registered with the Canada Revenue Agency (#845528827RR0001).

Get in touch with us

••• If you're a financial advisor, email advisors@charitableimpact.com.

••• If you're a donor, email philanthropy@charitableimpact.com.

