

Create your charitable giving strategy

A donor-advised fund allows you to set money aside for charitable giving, then take time to think about where, when, and how you want to give. Creating a plan enables you to make more confident giving decisions as a donor.

Below is a list of questions to help us understand your values and how you want to give, so that you can make a meaningful impact.

Reflect on your values & previous gifts

Thinking about your personal values and past charitable gifts is important. It can help you connect your core beliefs and motivations to your actions, so that your future charitable gifts reflect what you care about.

1.1 What is your motivation for charitable giving?

e.g. building a legacy, teaching your children,
participating in your community, religious commitment



1.2 What has your charitable giving looked like in the past?

Do you have any current charitable commitments?

Identify your charitable giving approach

Determining when and how you want to give is just as important as deciding where to give. Consider these questions so that your giving choices reflect your personal preferences and relationships.

2.1 | Do you want to give independently, with a partner, or collaboratively with your family or community?

2.2 | How frequently would you like to give to charities? e.g. monthly, quarterly, annually

2.3 | Are you interested in planning your gifts in advance, sending gifts on an as-needed basis, or both?

2.4 | Will your giving take place during your lifetime only, after your death, or both?

2.5 | Would you like to give using your personal name, a “foundation” name, or anonymously?

Decide where to give

Think about what causes matter to you, so you'll be able to identify charities, other qualified donees, and Giving Groups that align with your interests.

3.1 | Are there causes that are meaningful to you? If yes, what are they?

e.g. animal welfare, arts & culture, civil rights & advocacy, disaster preparedness & relief, environment, health, international development, poverty relief



3.2 | Do you want to support local, provincial, national, and/or international efforts?

3.3 | What characteristics do you look for in a beneficiary?

e.g. Indigenous-led, women-led, small vs. large organizations, publicly available financial reports

Monitor & adjust your plan

Charitable giving is very personal, and we're here to support your giving, your way. We're available to review your charitable giving strategy with you frequently and make changes as needed. Consider these questions as you move forward with your giving.

4.1 | What do you want to achieve with your charitable giving?

e.g. create a giving strategy or succession plan, establish annual giving goals, engage others with philanthropy, develop a relationship with a particular cause or charity

4.2 | How often do you want to connect with us about your charitable giving strategy?

