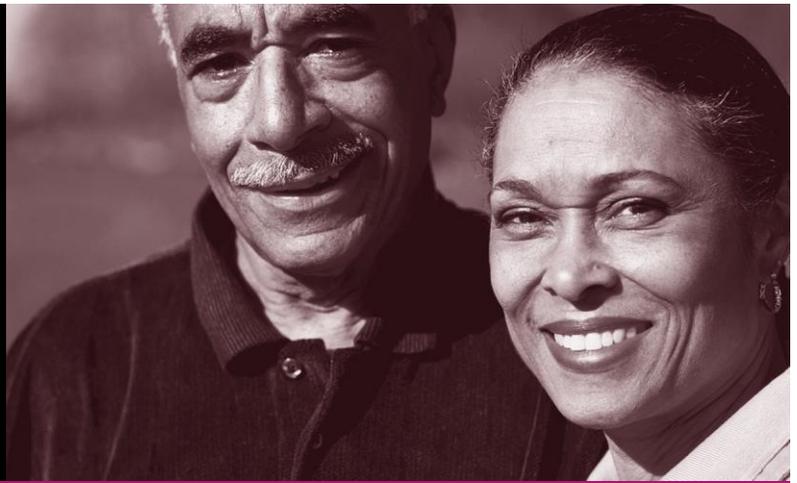


Meeting ever-changing community needs



UNRESTRICTED FUNDS

When you establish an Unrestricted Fund, your gift addresses a broad range of local needs – including future needs that often cannot be anticipated at the time your gift is made. We evaluate all aspects of community well-being: arts and culture, economic development, education, environment, health and social services, neighbourhood revitalization, and more. The flexibility of your unrestricted gift enables your community foundation’s local experts to respond to the community’s most pressing needs, today and tomorrow.

How it works

- You make an unrestricted gift to your community foundation during your lifetime or through a bequest in your will. You can give cash, appreciated stocks, real estate, or other assets.
- We set up a special fund in your name, in the name of your family or business, or in honour of any person or organization you choose.
- You receive tax benefits in the year your gift is made. Our professional staff determines the areas of community need that would benefit the most through grants from your gift.
- Our board issues grants in the name of the fund you establish (if you prefer, grants can be made anonymously).
- We handle all the administrative details.
- Your gift can be placed into an endowment that is invested over time. Earnings from your fund are used to make grants addressing community needs. Your gift – and all future earnings from your gift – is a permanent source of community capital, helping to do good work forever.

A lasting legacy

Peggy and Ed Gibb always made giving to their community a personal priority. In meetings with their professional advisor, they began to consider including a bequest that would benefit their local community. “Peggy and I care a lot about this town,” says Ed. “We wanted to give in a way that would continually help the people who live here.” After considering their options, the Gibbs decided to establish an Unrestricted Fund with their local community foundation. The Gibb Community Fund would take effect after they both passed away, leaving a portion of their estate to charity. “By establishing an Unrestricted Fund, we were able to keep our gift from becoming outdated. Community needs change, so we wanted to make sure our gift wasn’t too narrowly focused,” says Peggy. “Because it’s endowed at the community foundation, our gift will make a difference forever,” Ed says. “It will grow over time and become a more and more valuable asset for our community. This is exactly the legacy Peggy and I want to leave.”



SMART & CARING
COMMUNITIES



www.SurreyCares.org

Unrestricted Funds

Ten reasons people choose community foundations.

one

We are a **local organization** with deep roots in the community, and part of a nationwide movement whose support we build and share.

two

We bring donors to the table as **community builders**, working closely with them to align their philanthropic vision with the community's needs.

three

We identify **long-term needs** and opportunities and invest in solutions that let our communities guide their own future.

four

We take a broad and inclusive view of what a community is, and **provide grants** to the widest possible range of organizations and initiatives.

five

We provide highly **personal and flexible service**, accepting a wide variety of assets and offering donors maximum tax advantage.

six

We build **permanent funds** and those that can respond to immediate needs, helping our communities ensure vital futures.

seven

We **multiply the impact** of gift dollars by pooling them with other gifts.

eight

We believe that diversity is strength, so we **bring the entire community together** to stimulate new ideas, build participation and strengthen community philanthropy.

nine

We are **transparent and reputable stewards** of community resources, committed to being accountable, accessible and responsive.

ten

We build **community vitality** – the unique and essential spirit that flourishes when people believe their community holds possibilities for everyone.

More benefits

Because you set no restrictions on the use of your gift, it enables our experienced staff and board to do what they do best – assess community needs and respond by issuing grants to the non-profit organizations that undertake our community's most critical work. Unrestricted Funds help your community foundation to support long-term solutions; respond quickly to immediate needs; and meet changing social, cultural, educational, or environmental necessities in our local community.

Grants are made in the name of the fund you establish, creating your personal legacy of giving. You may give your gift immediately or through your will or other estate planning strategy. If you endow your gift, it becomes a permanent resource for the community.

Community means so many things to so many people and the world to us. In all we do, and all we say, we are all for community.

We are part of Canada's community foundation movement, represented by more than 160 community foundations from coast to coast.

Community vitality has been our purpose, promise and passion since 1921, when we began connecting donors to community needs and opportunities.

Together, we help Canadians invest in building strong and resilient places to live, work and play.