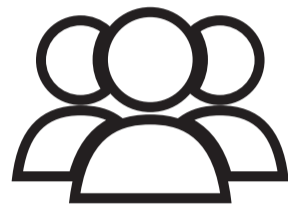


Establishing a Fund

1 Donor

Individual
or Family



Company or
Business



Charity or Community
Organization



2 Gift Options

Cash
Donation



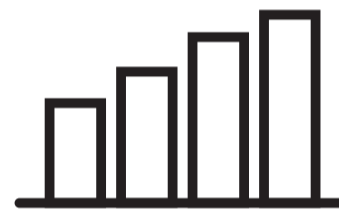
Life
Insurance



Bequest



Public
Securities



Retirement
Funds



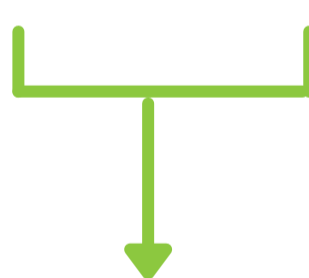
Advisor
Managed
Funds



3 Choose Your Fund Type

See reverse
page for
details

Smart &
Caring Fund



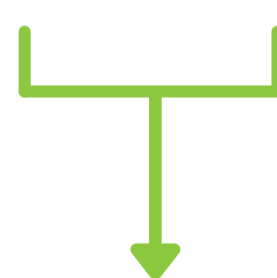
Due Diligence

CFSEA utilizes Vital Events to determine current community needs. Grant applications are submitted by local charities which are reviewed by a committee to determine successful grant requests.

Designated
Fund

Field of
Interest
Fund

Donor
Advised



Direct Donor Advice

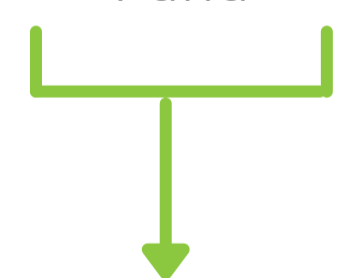
CFSEA connects with fund holders annually as to which charitable organization(s) they would like to support.

Scholarship
Fund

CFSEA
Operations
Fund

Agency
Fund

Rural
Community
Fund



Rural Community Fund Options

Community Funds allow donors to "give where they live" to support the charitable needs in their specific geographical region.

4 Donor Recognition

CFSEA works with donors to help guide them through their philanthropic journey. Donors are welcome to share their story to be featured digitally and through various publications. They are invited to annual grant presentations, Vital Events, and other celebrations.

Note: CFSEA handles all the administrative details and issues grants to charities in the name of your established fund.

Learn more about how you can contribute to a vibrant, healthy, caring community at cfsea.ca or by calling 403-527-9038

Types of Endowment Funds

There are a number of options for your donation to be allocated within CFSEA's Endowment Fund:

Smart and Caring Fund:

Smart and Caring Funds respond to the ever-changing needs of our region now and for generations to come. Investment income is distributed through a granting process.

Minimum gift of \$1,000

Designated Fund:

Choose your favourite registered charitable organization(s) and each year the investment income will be dispersed to that organization(s).

Minimum gift of \$5,000

Field of Interest Fund:

Support your charitable areas of interest, while still responding to our region's greatest needs. Examples of Field of Interest include: arts, youth, seniors, health, environment, etc. CFSEA directs investment income to specific charities that deliver services in the donor's chosen field(s).

Minimum gift of \$10,000

Donor Advised Fund:

Donors advise CFSEA each year as to which charitable organization(s) are to benefit from the investment income from their fund. Donor Advised Funds allows the donor to change their philanthropic focus each year.

Minimum gift of \$15,000

Scholarship Fund:

Donors can establish specific Scholarship Funds to support Southeastern Alberta students in their educational pursuits. Donors determine the scholarship criteria and specific school district(s). CFSEA issues the scholarship amount annually to that school district(s). The school district in turn selects the recipients based on the donor's criteria.

Minimum gift of \$15,000

CFSEA Operations Endowment Fund:

CFSEA has ensured its ongoing administrative operations with the establishment of a specific Endowment Fund. Secure funding is crucial to our continued growth, leadership, and impact. We invite every donor to consider allocating a portion of their gifts to the sustainability of the Foundation in the range of 10-15%.

Agency Fund:

Investment income from their permanently endowed funds are issued back to the agency.

Minimum gift of \$5,000

Advisor Managed Endowment Fund:

Donors can work with their investment advisor to establish an endowment with CFSEA to benefit the charity(s) of their choice. This partnership provides donors the opportunity to choose their own advisor.

Minimum gift of \$250,000

Rural Community Funds: "Give where you live"

- **Brooks & District Community Fund:** Encompassing Brooks and the County of Newell
- **Rural Community Fund of Forty Mile:** Encompassing the County of Forty Mile No. 8
- **Prairie Crocus Community Fund:** Encompassing Special Areas 2, 3, and the MD of Acadia
- **Cypress County Community Fund:** Encompassing Cypress County