



THE CANADIAN
MEDICAL FOUNDATION
LA FONDATION
MÉDICALE CANADIENNE

Creating your legacy

- 1 Choose one or more registered Canadian charities that you want to support.
- 2 Establish your Fund with a gift of \$50,000 or more and receive a charitable tax receipt. Additional contributions of \$5,000 may be made after the Fund is established.
- 3 Name your Fund after yourself or in honour of a loved one.

Example: You and your family decide to establish a Donor Advised Fund during your lifetime. You create the Fund with a gift of \$100,000 of qualified securities to benefit your three favourite charities: a religious group, a health care organization and an educational institution.

A tax receipt is issued for your \$100,000 donation and the capital gains are deemed to be nil on your gift of qualified securities. The Fund is established by the Canadian Medical Foundation according to your wishes, and your generosity becomes a reality when a portion of the income earned on your Fund is distributed annually to your chosen charities.

For more information, please contact your MD advisor or the Canadian Medical Foundation's director of charitable giving.

Tel. 613 520.7681 / 866 530.4979 or Email: info@cmf.ca
www.medicalfoundation.ca

The Canadian Medical Foundation gratefully acknowledges MD Financial and the CMA's ongoing generosity and support.



MD Financial includes CMA Holdings Incorporated companies offering financial planning and a banking referral service through MD Management Limited, mutual funds by MD Funds Management Inc. and MD Private Trust Company, investment counselling services by MD Private Investment Management Inc., estate and trust services by MD Private Trust Company, and insurance products by MD Life Insurance Company and MD Insurance Agency Limited.

“Achieving excellence in health care through medical philanthropy”

— this is the vision of the Canadian Medical Foundation. Organized, guided and funded by the physicians of Canada, the CMF raises, invests and distributes funds through a range of programs and services designed to improve health care in Canada and abroad.

Philanthropy for physicians
DONOR ADVISED FUNDS

Philanthropy tailored to your needs

Many Canadian physicians reach a point in their lives and careers where the opportunity to give back shifts from a wish to a reality. When the time comes to make strategic decisions about supporting the charitable causes that mean the most to you and your family, the Canadian Medical Foundation (CMF) can help make it easier by offering you the opportunity to create a Donor Advised Fund.

A Donor Advised Fund is a very special way to give. It is a charitable fund that is established by you and invested and managed by the CMF. A portion of the annual income from the Fund supports your favourite Canadian charities, providing them with a continuous stream of income.

A Donor Advised Fund enables you to create an enduring charitable legacy while realizing significant tax advantages. It may be created during your lifetime or as part of your estate plan.

Important consideration

Your tax savings can be substantially greater when donating qualified publicly traded securities, including mutual funds, directly to the CMF rather than donating the cash proceeds from the sale of the same securities.

A Donor Advised Fund is very easy to set up and offers many advantages:

- Simplifies your annual charitable giving
- Provides on-going support to your favourite charities
- Establishes a lasting legacy—your gift is there for future generations
- Can realize significant tax benefits
- Offers flexibility—to change your chosen charities, add to your Fund over time and name successors

Your Donor Advised Fund can also support the CMF and its core programs

- **Medical Education:** Assuring excellence in the next generation of physicians through scholarships, bursaries and leadership opportunities.
- **Medical Outreach:** Bringing professional resources to communities in need in Canada and around the world.
- **Physician Health and Well-being:** Building programs and resources to help physicians deeply affected by the stresses of practice and personal health issues.



Did you know that you can claim charitable contributions of up to 75 per cent of your net income, with a five-year carry-forward on any unused amounts?

Perhaps most importantly, the Canadian Medical Foundation is a creation of the Canadian Medical Association (CMA). As such, all Funds are carefully managed by the CMA's financial subsidiary, MD Private Investment Management, which is built on MD Financial's history of offering quality investment products and services exclusively to CMA members and their families.

Your opportunity to make a difference

Creating a Donor Advised Fund provides an opportunity as great as your imagination, driven by the ways in which you want to make a difference. We're ready to help you achieve your philanthropic goals and dreams.

You can establish your Donor Advised Fund via:

- Cheque or wire transfer
- Qualified securities transfer
- Your will
- A life insurance policy

