



## About Canmore Rotary Club Charitable Foundation

Rotary Club of Canmore and the Canmore Rotary Club Charitable Foundation (CRCCF) have been trusted partners in the non-profit sector for decades. We are a service club dedicated to improving the lives of others in both our local community and around the world. Rotary is built on Service and Connections – “People Meeting People Helping People”. Each day our members pour their passion, integrity and skills into projects that have a lasting impact. We meet, support each other, laugh, and work hard to raise funds and volunteer to make our community a better, more supportive place to live, work and play. We help improve communities through a range of humanitarian, intercultural and educational activities and grant-making.

The Canmore Rotary Club Charitable Foundation is our registered charity, providing an opportunity to make charitable donations in support of Rotary and its charitable work through service and granting funds. We seek and receive charitable donations, steward gifts, and grant funds grounded in Rotary goals and values.

## Our Impact

Since 1991, the Rotary Club of Canmore has distributed millions of dollars of support and resources for our local and international communities. We have the ability to meet the changing needs of our community by providing money and volunteers quickly when the situation warrants for projects aligned with Rotary Areas of Service and for crises or special projects.

From supporting the regional science fair, youth sports, scholarships, sensory rooms in local schools, food programs and parks, Rotary contributes to our community. Promoting and supporting international projects builds strong local citizens while contributing to international projects.

Rotary responds to crisis and priority projects:

- In 2013 our flood relief fund collected and distributed in excess of \$880,000
- Since 2016 we raised in excess of \$100,000 for the Bow Valley Syrian Refugee project
- In 2017 we collected in excess of \$92,000 for the Fort McMurray fire relief which we transferred to the Rotary District Foundation who distributed the funds
- Since 2018 we have committed over \$111,000 to the YWCA Banff Higher Ground Women’s Shelter
- In 2020/21 we raised over \$188,000 to support our communities through the COVID-19 Pandemic

## How Your Gift Will Be Used

Our granting process makes it easier to give to those causes that need support most. Guided by Rotary Club's Avenues of Service and a grant evaluation process, gifts will be distributed in the community on your behalf. Areas of focus include:

- Health of the community
- Seniors and disadvantaged families and their children
- Advancement of education in the Bow Valley and which includes Stoney Nakoda Nation
- Support for parks, playgrounds, recreational and cultural facilities
- Aid for people in developing countries
- Special projects and initiatives adopted by the Rotary Club of Canmore – for example, Higher Ground project through the YWCA Banff, providing shelter for domestic and sexual violence victims with future construction of a purpose-built facility in Canmore
- Emergency Response – as witnessed by community support during the Flood of 2013 and the COVID 19 pandemic of 2020/21

## Ways To Support Your Community Through the Foundation

1. **Rotary Today Fund.** Your donation will immediately help support the work that we do in our community and beyond. The Foundation works with the Club to identify areas of greatest need and impact and allocates funds towards those causes annually. Rotary volunteers carefully weigh grant applications and identify funding opportunities to make informed investments for your donated dollars.

2. **Rotary Forever Fund.** You may choose to invest your donation into our long-term endowment fund. The intent of this investment is to keep your donation whole, spending the income earned annually towards priority funding areas. As a result, your gift will provide funds for years to come. Funds will be held and managed through the Calgary Foundation.

We have witnessed first-hand that crises are unpredictable, and those crises rely on the non-profit sector and donations to ensure that we all get through those difficult times. Endowed gifts will help ensure that funds are available to support priorities, even when circumstances prevent fund-raising. While funds are intended to be invested for the long-term, we will have the ability to thoughtfully spend these invested funds should the need arise in the future if donations are not available, and the need for funding is critical.

## How You Can Help

Rotary has several options to make it easier for you to invest in your community, and in the ideals and priorities that Rotary provides.

**One Time or Monthly Giving** – Sign up to make a monthly donation by credit card. This is an easy and convenient way to support Rotary – once it is set up, you can relax knowing that Rotary is carefully stewarding your donation. Mailing a cheque or Interac e-Transfer to [canmorerotaryfoundation@gmail.com](mailto:canmorerotaryfoundation@gmail.com) are other options.

DONATE NOW <https://www.canadahelps.org/en/dn/4985>

**In Memory/In Honour Donations of Individuals** - If you would like to donate in memory or in celebration of someone by name, here's a great way to do it! You will be able to name the individual and choose an option that sends them an e-card advising them of the donation in their name.

DONATE IN MEMORY/IN HONOUR <https://www.canadahelps.org/en/dn/t/36370>

**Gifts of Securities** – Appreciated securities are an extremely tax-effective way to donate. Rotary works with CanadaHelps to enable your gift of appreciated securities.

DONATE SECURITIES <https://www.canadahelps.org/en/dn/s/45078>

**Leave A Legacy Gift In Your Will To Change Lives** – Canmore Rotary Club Charitable Foundation is grateful for those who choose to leave a gift in their will. When considering your gift, please remember to direct your donation to “Canmore Rotary Club Charitable Foundation charitable registration number: 863715520RR0001” to ensure that you receive a charitable tax receipt. Your financial advisor can help you to structure a gift that minimizes tax and maximizes the lasting impact you will have in our community. You have the opportunity to contribute in many ways: Cash, Securities, Life Insurance (cash value and/or death proceeds), Gifts In Kind (real estate, tangibles) and RRSP/RRIF (plan assets).



Canmore Rotary Club Charitable Foundation has partnered with Will Power, a national movement to educate Canadians on the power they have to make a difference through their Wills. The Will Power initiative is being spearheaded by the CAGP Foundation. The Canadian Association of Gift Planners (CAGP) is a professional association that brings together charitable fundraisers and advisors in Canada to create a better world through strategic charitable giving.

Will Power campaign details and simple tools to leave a gift in your will: <https://www.willpower.ca/>

Visit our campaign page on the Will Power website: <https://www.willpower.ca/charities/canmore-rotary-club-charitable-foundation/>

## Creating Your Legacy

There are two ways to include the Canmore Rotary Club Charitable Foundation in your estate plans, regardless of whether your gift is through your will, a gift of life insurance or other type of arrangement:

1. To provide the Canmore Rotary Club Charitable Foundation with direct assistance to meet its current priorities, consider leaving your gift to the **Canmore Rotary Club Charitable Foundation**. These gifts can be directed to be used for a specific purpose (community, vocational, international or youth projects) or more frequently are left to the **Canmore Rotary Club Charitable Foundation** with flexibility to determine how your gift can best be used to support its mission.
2. If you want to ensure that your gift is added to the Endowment so that the principal may have an effect for years after your gift is realized, consider leaving your gift to the **Canmore Rotary Club Charitable Foundation (Endowment Fund)**. Again you can direct the gift to be used for specific long-term purposes (community, vocational, international or youth projects) or left to the Foundation with flexibility to determine how your gift can best support the **Canmore Rotary Club Charitable Foundation** from year to year. Your gift is invested by the Foundation for use by the **Canmore Rotary Club Charitable Foundation** in the future.

## Leave A Gift In Your Will Sample Language

The following is sample language to provide for the Canmore Rotary Club Charitable Foundation **(OR)** the Canmore Rotary Club Charitable Foundation Endowment Fund in your will.

### Undesignated Bequests

I give and bequeath to the **Canmore Rotary Club Charitable Foundation** with the charitable registration number 863715520 RR 0001, the residue of my Estate (or \_\_\_\_\_% of the residue of my Estate or the sum of \$\_\_\_\_\_ ) to be used as the Canmore Rotary Club Charitable Foundation may deem appropriate.

I give and bequeath to the **Canmore Rotary Club Charitable Foundation (Endowment Fund)** with the charitable registration number 863715520 RR 0001, the residue of my Estate (or \_\_\_\_\_% of the residue of my Estate or the sum of \$\_\_\_\_\_ ) to be used as the Canmore Rotary Club Charitable Foundation may deem appropriate.

## Designated Bequests

Designated bequests may only be directed to the existing funds within the **Canmore Rotary Club Charitable Foundation** or the **Canmore Rotary Club Charitable Foundation (Endowment Fund)**. The funds include community, vocational, international or youth projects.

I give and bequeath to the **Canmore Rotary Club Charitable Foundation** with the charitable registration number 863715520 RR 0001, the residue of my Estate (or \_\_\_\_\_% of the residue of my Estate or the sum of \$\_\_\_\_\_) to be added to the (NAME OF THE FUND).

I give and bequeath to the **Canmore Rotary Club Charitable Foundation (Endowment Fund)** with the charitable registration number 863715520 RR 0001, the residue of my Estate (or \_\_\_\_\_% of the residue of my Estate or the sum of \$\_\_\_\_\_) to be added to the (NAME OF THE FUND).

### **Power to Vary Clause (please include if Bequest is Designated):**

"In the event that unforeseen circumstances make the specified use of this bequest no longer practical or desirable, the Foundation Board is hereby authorized to make such changes that are in keeping as far as possible with the spirit and general intent of this bequest."

### **DISCLAIMER**

The Legacy Giving information in this document is provided for general information purposes only. It is not intended as a substitute for professional advice and assistance from your lawyer, financial advisor, or tax consultant. We recommend that you discuss your plans with your lawyer and/or financial advisor before proceeding with a legacy gift.

### **Canmore Rotary Club Charitable Foundation information**

Registered name: Canmore Rotary Club Charitable Foundation

Canadian charitable registration number: 863715520 RR 0001

Mailing address: PO Box 8025, Canmore, AB T1W 2T8

For more information, contact **Lawrence Nyman** at the email address or phone number below.

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