

Rotary



District 5360

January 28, 2020



WELCOME FELLOW ROTARIANS!!

- Housekeeping
- Community Foundations
- Calgary Foundation
- Rotary 5360 - Specific support and restrictions
- Q&A
- What's next?



OUR WHY

We inspire philanthropy,
support the charitable sector and
build a permanent endowment
to address the current and future
needs of people in our community.

1997

Gift of \$3 Million
Galvin Family

30TH
Anniversary

1985

\$4.2 Million asset base
\$2.4 Million in new gifts
\$371,730 granted to
63 charitable organizations

1994

Gift of \$2 Million
Galvin Family

40TH
Anniversary

1995

\$37.7 Million asset base
\$5.7 Million in new gifts
\$2.4 Million granted to
197 charitable organizations

1979

Million Dollar Dinner
led by Hayden Smith
raises assets from
\$190,000 to \$2 Million



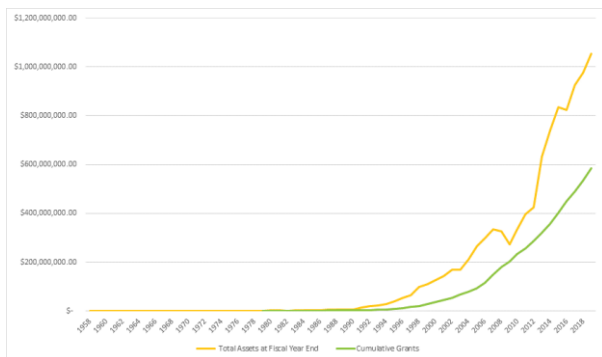
1964

20 founding donors make
gifts of \$5,000 each

April 6

1955

Calgary Foundation established,
Grant MacEwan inaugural Chair



Asset base of
\$1.08 billion

\$583.6 million
granted
since 1955

2019 BY THE NUMBERS



\$48.9 million granted to
981 charitable organizations



61 new Funds established



37 staff members



\$65.2 million received in new gifts



asset base of **\$1.1 billion**



Ten year compound return

Primary endowment portfolio returned **7.82%**
benchmark indices **6.30%**

One year compound return

Primary endowment portfolio returned **7.72%**
benchmark indices **5.60%**

How we do it



Inspiring Philanthropy

Sharing
Community
Knowledge

Supporting
donors

Engaging
families



Supporting Charities

Granting:
Unrestricted & Donor

Engaging citizens

Building capacity

Strengthening
Indigenous relations

Impact investing &
innovative philanthropy



Building Endowment

Investing

Managing finances

VISION:

Create a
healthy and
vibrant
community
where
everyone
belongs



HOW WE CAN SERVE YOU

- Flexible Flow Through Funds uniquely named for each Club
- Fast/efficient tax receipting for donors (online option)
- Access to our secure online donor portal Donor Central
- Reduce administrative burden on Club volunteers
- Direct deposit granting to most charities
- Charitable research
- Our knowledgeable team



Our Limitations

- We do not fundraise (see third party fundraising guidelines sent prior to webinar)
- We can only receipt philanthropic gifts (no silent auction donations, no property donations etc.)
- We can only grant to [CRA Qualified Donees](#)
- Examples



We're here to help!



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