



Donor Advised Funds

A Donor Advised Fund (DAF) is a strategic approach to giving that provides all the advantages of a private family foundation without the upfront costs and administrative responsibilities. A DAF enables you to provide funds for your favourite charities now and in the future while enjoying immediate tax benefits.

Why UHN Foundation?

University Health Network (UHN) is Canada's No. 1 hospital and the world's No. 1 publicly funded hospital. As Canada's top research hospital, the scope of research and complexity of cases at UHN have made it a national and international source for discovery, education and patient care.

UHN Foundation is one of two fundraising arms of University Health Network (UHN), supporting Toronto General Hospital, Toronto Western Hospital, Toronto Rehab and The Michener Institute of Education. It is one of the top three foundations in Canada, with funds under its management valued at more than \$1 billion. Our investment committee includes many of Canada's leading investment advisors.

Types of DAFs

For a minimum of \$50,000 (payable over five years) you can establish a Legacy DAF, Expendable DAF or a combination of both.

Legacy DAF: Funds are invested and administered by UHN Foundation for a fixed period of time or in perpetuity. The income earned from the Legacy DAF is made available for granting to your favourite charities and UHN Foundation.*

Expendable DAF: Funds are administered by UHN Foundation to ensure the capital is available for distribution to your favourite charities and UHN Foundation immediately or over a fixed period of time.**

* 1.5% administrative fee is applied to Legacy DAFs

** Investment income from the Expendable DAF will be granted to UHN Foundation



Advantages of a DAF

Give funds to your favourite charities

Build your personal or family legacy

Create a multi-generational approach to philanthropy

Centralize the investment and administration of your charitable assets

Establishing your DAF

You can establish a DAF as an individual, through your company or through your trust or estate plan – ensuring your favourite charities continue to benefit for years to come. You can contribute in the following ways:

- Cash
- Publicly traded securities (e.g., mutual funds, equities, stocks, bonds)

Establish your DAF in 4 easy steps

1

Make your gift

A minimum gift of \$50,000 is required to establish your DAF.

2

Name your DAF

There are many options for naming your DAF, but most donors name it after themselves, their family or their company (e.g., the Smith Family Charitable Fund).

3

Name your advisors and successor advisors

You can appoint one or more people (including yourself) to act as advisors to make recommendations and obtain information about your DAF. You must designate a successor advisor for your DAF in the event that your primary advisors are unable to act.

4

Choose your charities

Once a year, you will decide which charities you'd like to donate to, with a minimum of 20% going towards UHN Foundation.



Third party donations

A DAF is the perfect way to encourage others to share in your passion for giving. Celebrate the big moments in your life by asking your friends and family to contribute to your DAF in lieu of traditional presents.

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More and more people are discovering the benefits of Donor Advised Funds. They offer an easy and cost-effective way to establish a family legacy of charitable giving and continue that tradition across generations. Your DAF can be named after yourself or loved ones, or you can choose to remain anonymous.”

— MARVI RICKER

Legacy donor and former member of UHN Foundation's Board of Directors

To learn more, please contact:

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