

CENTRAIDE OF GREATER MONTREAL FOUNDATION

A
GESTURE
OF
THE
HEART ♦

Mission

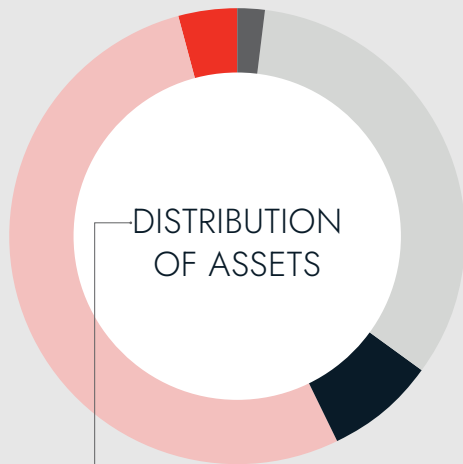
The mission of the Centraide of Greater Montreal Foundation **is to build and grow significant ongoing capital**. Bequests, life insurance policies, endowment funds and other forms of planned gifts to Centraide are invested in the Foundation, which ensures that these donations grow over time to provide Centraide with sustainable income.

Planned giving, a model for social sustainability

The Foundation grants a yearly amount (**\$1.6M** in 2021) to Centraide **to maximize the impact of its investments in the community**, thus fighting more efficiently against poverty and social exclusion.

A NEW POTENTIAL FOR GENEROSITY

WHILE AN IMPORTANT GENERATIONAL TRANSFER OF ASSETS IS TAKING PLACE NATURALLY, **3 % OF QUEBECERS** HAVE PLANNED GIFT UNTIL NOW COMPARED TO **11 % OF CANADIANS** FROM OTHER PROVINCES*. A STRONG POTENTIAL REMAINS TO BE EXPLORED BY QUEBECERS AS THEY DISCOVER AND EMBRACE THIS FORM OF GIVING WHICH IS STILL NEW IN QUÉBEC.



- **Cash** 2%
- **Bonds** 33%
- **Canadian equity** 8%
- **Global equity** 53%
- **Alternative investments** 4%

Investment philosophy

The audit and investment committee ensures that the Foundation's assets are invested responsibly thanks to:

- a good balance between performance and risk,
- reasonable and manageable volatility,
- a high level of diversification of assets,
- the inclusion of investment decisions,
- and ESG strategies (environmental, social, and governance practices).

\$55.4M

Value of assets
(as of August 31 2021)

7.8%

Annualized gross
return (10 years)

\$1.6M

Distributed to
Centraide in 2021

IMPACT AND BENEFITS OF INVESTMENTS

On the eve of Centraide's 50th anniversary, a planned giving campaign has been launched to ensure a sustainable income for Centraide to accomplish its mission for future generations.



Collect



Save



Grow



Donate



For more information

Visit centraide-mtl.org/planned-giving or contact the Planned Giving Department to discuss the steps to planning a gift.

514-350-7295
centraide-mtl.org/planned-giving



Centraide
of Greater Montreal