

FALL 2017

LinkNEWS

STAYING CURRENT

Linking donors and their charities



Link Charity started in 1998, and is a registered charity providing valuable service operating as a 'link' between donors and their charities. Link Charity offers service, tools, education, and guidance in gift planning for individuals and for charities. In its latest fiscal, Link Charity provided \$9.8 million to almost 700 charities in Canada.

Charitable Distribution Six years



In F'2017, Link Charity distributed \$9.8 million to almost 700 qualified donees.

*based on Fiscal Year ending on June 30th

Charitable Gift Fund Six years



Assets Being Managed and Administered

Why

- To inspire and educate people to make legacy gifts, fulfilling their philanthropic wishes (dreams, goals, and desires) by introducing them to the potential and benefits associated with legacy/planned giving.
- To assist member charities with optimizing legacy gift potential, providing increased revenue via planned giving to help them to fulfill their cause.

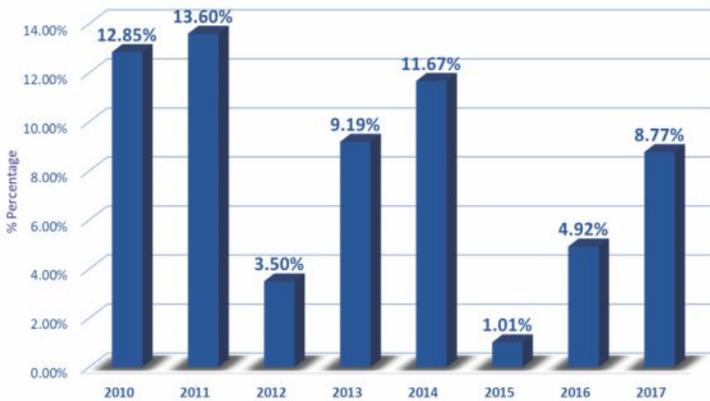
How Can Link Charity Help You?

- We offer a unique legacy gift in the form of the charitable gift annuity (CGA) which can be a valuable gift in any legacy plan.
- We have achieved an average annual rate of return of 8% on our charitable investment fund, and strive to maintain that.
- We have an excellent remainder rate with an average of 84% on matured annuities, which increases to 96% on single life agreements*.

*Fiscal 2017 results

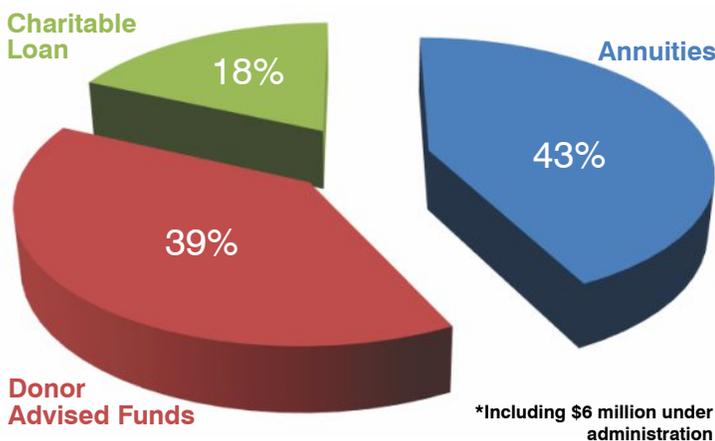
- Low admin fees to manage and administer our charitable fund (.5%) compared to other organizations.
- Low fees to facilitate the transfer of appreciated securities to encourage participation. Link does not take a percentage of the donation so more of the gift goes to charity as a result.
- No fee to the donor to facilitate direct beneficiary letters of direction pertaining to wills.
- Extremely low charity member annual fees.

Rate of Return for the last 8 years

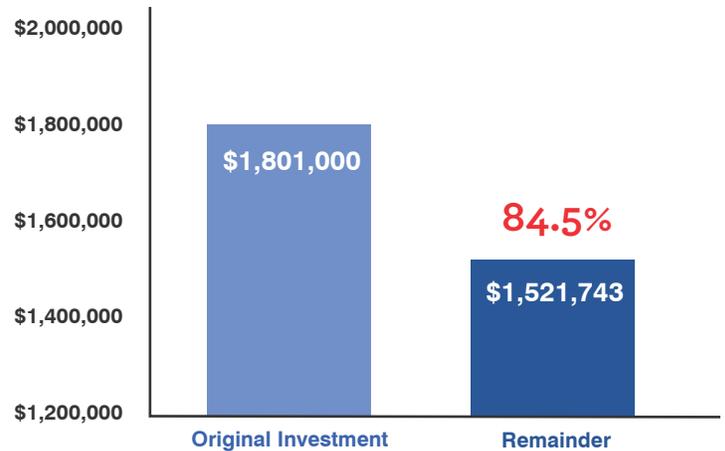


Annualized rate of return since inception is 8.0%

Source of Funds Charitable Gift Fund @ \$47.4 Million



Fiscal 2017 Matured Annuities



41 Annuity Agreements matured in Fiscal 2017, and 84.5% of the original capital was retained for charitable distribution.



Mary (not her real name) is in her 80's and has been blessed with considerable assets. She has named Link Charity as the beneficiary of her estate in her will. She sent Link Charity a revised letter of direction as to which charities are to benefit.

It did not require a lawyer, lawyer visits or fees. The executor will have one charity, Link Charity, with which to deal, and not dozens.

Mary also took out several charitable gift annuities, and currently enjoys significant, tax free, worry free, income for life. The balance of those gift annuity agreements will be distributed at her death to her selected charities as well.

She also paid for a gift annuity for a friend in financial need. Mary received the charitable receipt, and her friend in need receives quarterly, tax free income that is a real help. Due to its tax free nature, this income did not interfere with various supplementary government benefits to which the friend is entitled.

What's more, Mary also makes a gift of securities every year to Link Charity, to take advantage of the capital gain exemption, and Link Charity makes generous gifts from the proceeds to the charities of her choice.

Link Charity Contact Information

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