

YOUR GUIDE TO GIVING



Department of Illumination



County Food Hub



Quitissimo

YOUR GUIDE TO GIVING

Giving through The County Foundation



Let's make a difference together.

If you are reading this, you are already taking the first step in learning how you can have a significant impact in our community. You want to make a difference and we are here to help.

What is a local community foundation?

Community foundations exist to improve quality of life for people in a specific geographic area, highlighting the greatest needs and engaging the community to understand and fund those needs.

The County Foundation belongs to a network of **over 200 community foundations from across Canada**. This network provides us with support including resources and knowledge on charitable giving and grantmaking from across the country.

TCF BY THE NUMBERS

Over \$10 million

Total assets under administration

Over \$10 million

Grants facilitated since inception

Since 2008, The County Foundation has been serving Prince Edward County with the aim of creating a vibrant and inclusive community.

Our Vital Signs data identifies the needs in the County and we use this information to direct donations where they can have the greatest impact on our community's well-being. **By working together, we can build a place where everyone belongs.**

Why give through The County Foundation?

Become more strategic with your giving. Leveraging the resources and know-how of your community foundation makes a lot of sense. There are many ways to get involved and create real impact here in Prince Edward County.

Let's help each other. Make your giving go further.

Below are more reasons why donors choose to work with us.

Rooted in Community

We have extensive local knowledge from our Vital Signs data, our grant programs, and our work with community organizations.

Tailored to You

We provide straightforward, effective ways to make a meaningful impact. Together, we'll identify how you can best support the causes you care about in your community

Peace of Mind

We take care of the set up and backend administration including tax receipting and CRA reporting – saving you time and money

Reputation & Experience

We build trust with our donors through our expertise and strategic guidance to help them get the most impact from their giving.

Financial Management

Our funds are professionally managed, so even small gifts benefit from expert investment oversight—giving donors peace of mind that their contributions are working wisely

Cost Effective

We keep our admin fees to a minimum, which means more of your money goes back to the community instead of to overhead costs.

You might choose to set up a fund during your lifetime. Or you may choose to build a lasting legacy through a gift to The County Foundation in your Will. Either way, by contributing to a fund, you will safeguard your charitable goals – ensuring your intentions remain intact throughout your lifetime and beyond.

Community foundations are uniquely positioned to help you understand local needs and ensure your giving creates meaningful impact. We have deep knowledge of the issues facing our community and the organizations working to address them



“We are happy to play our part to support our beloved PEC by investing in vital community organizations ... We're thankful for the guidance and stewardship of The County Foundation, comprised of a volunteer board, along with excellent staff.

Their Vital Signs report data identifies the needs in the County that helps direct donations to help 'build a place where everyone belongs and all can thrive'.”

Elderberry Fund Donors

A Rising Tide Lifts All Ships: The Power of Pooled Investments

When you give through a community foundation, your donation doesn't stand alone - it joins our pooled investment funds. **This helps grow your charitable dollars over time.**

Pooled funds have access to high-quality investment opportunities that may not be available to individual donors

For endowed or long-term funds, pooled investing helps ensure the fund remains sustainable, continuing to support the causes and charities you care about year after year.



Management of Invested Funds & Governance

Our pooled investment funds are governed by our Investment Policy Statement (IPS) and managed by an external investment manager. Our Investment Committee comprised of Board members oversees that our funds are invested in alignment with our IPS.

Our IPS provides direction to our asset managers on how funds are managed, ensuring investments remain sustainable over the long term while allowing flexibility to adapt to changing economic and climate conditions.

The County Foundation is governed by our Board of Directors, and our Finance Committee provides oversight on our internal financials and helps identify and mitigate financial risk.



“What we learned quickly about a small community is that everyone has an opinion about everything. That worked in our favour because everyone told us that TCF had a great reputation and that after we did our own research, we'd likely make the same decision that many others have.

We couldn't be more convinced that we've made the right decision for us, and we encourage others considering a legacy gift to connect with TCF and explore how to make it possible.”

David & Glen, Legacy Gift Donors



GETTING STARTED: LET'S PLAN FOR TOMORROW

Your gift is as individual as you are. **It reflects your values and hopes for the community.** That's why we offer a range of giving options to help you give with confidence

You can start your own fund dedicated to a cause of your choice – or you may choose to give where the needs are greatest through our Vital Impact Fund.



County Kids Read

Questions to Consider...

- Are you considering making a gift now, or are you thinking about including a gift through your Estate in the future?
- If you plan to give now, do you want to be actively involved in making decisions about where your gift goes, or would you prefer others to make those decisions based on your wishes?
- Would you like your gift to support a specific charity or cause, or would you rather it be directed toward the most urgent needs in the community?
- If you are thinking about supporting specific charities, do you already have certain organizations or causes in mind, or would it be helpful to explore some options together?

There are many ways to give and we will work with you to find the best method to support your goals, but **HOW** you have an impact can be summarized with two main options:

Contribute to Existing Fund

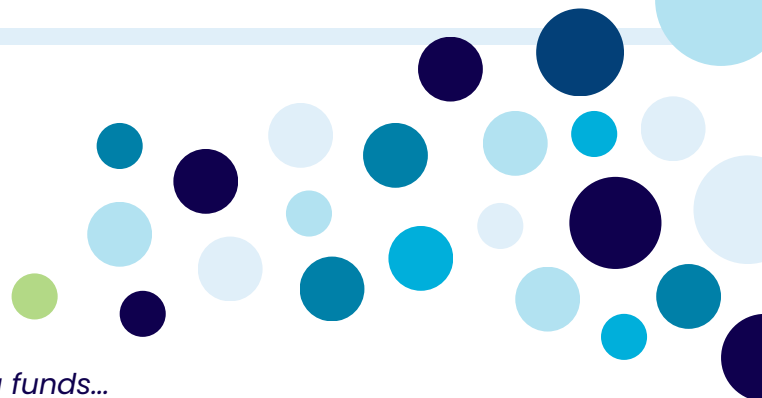
Support an existing fund that aligns with your values, addresses high priority needs, or gives to the areas you are passionate about. This is a great option for short term impact, or those looking to leave a lasting legacy.

Set up a New Fund

Set up a Donor Advised Fund to to give back to your community, a specific organization(s) or sector. The minimum investment to start a donor advised fund is \$25,000. You may also consider this as part of your Estate planning.

Being wealthy is not a prerequisite to having an impact in your community. Donations of all sizes can make a difference when pooled together to result in lasting change.

Let's learn a little more about some of our existing funds...



VITAL IMPACT FUND

The Vital Impact Fund is the **signature fund** of The County Foundation, bringing together the work of our Vital Signs data and our grants to better serve the most urgent needs of the Prince Edward County community.



Community



Economy



Education



Environment



Food Security



Health



Housing



Safety



Transportation

The Vital Impact Fund addresses the **9 Key Issues of Vital Signs**, using data to inform decision-making, identify gaps in community need, and direct support where resources can have the greatest impact.

Adaptable

It can be hard to anticipate what the future needs of the community will be, so the Vital Impact Fund is meant to be responsive and flexible.

Tangible

Supports organizations and programs with a strong plan, vision, and ability to "move the needle" on the key issues identified by Vital Signs.

Innovative

Granting to innovative and creative ideas that will serve as a catalyst for positive impact in Prince Edward County.

Below are just some of the initiatives that have been supported through the Vital Impact Fund



DAYCARE

Expansion of childcare services by the HUB Child & Family Centre with new 49-space childcare centre addressing waitlist of over 400 PEC families.



FOOD SECURITY

Collaborative effort to address food security spearheaded by the municipality's Poverty Roundtable initiative. Seeks to identify key actions and opportunities to address need.



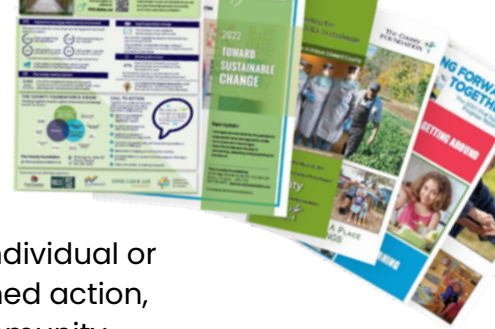
AFFORDABLE HOUSING

Affordable housing initiative for seniors (Pinecrest Housing). Funding to build capacity by hiring staff to assist with coordination and administration of project.



The Vital Impact Fund is an excellent fund to support for those looking to make an impact today but not sure where to start, for those interested in data-driven decisions, or for those looking to leave a legacy and have an impact on the future of our community.

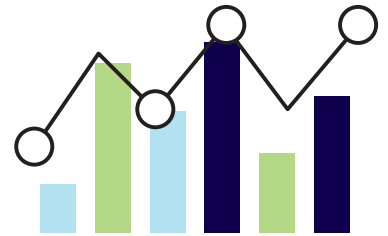
VITAL SIGNS



You can support the work of Vital Signs directly, as either an individual or as a sponsor if you are a business owner, empowering informed action, improving lives, and driving meaningful change in our community.

How is Vital Signs used in Prince Edward County?

- 1 Informs local decision making by equipping community leaders with up to date information on key issues and opportunities
- 2 The County Foundation's Vital Impact Fund uses Vital Signs data to identify community needs and disburse funds where they can have the greatest impact
- 3 Makes data accessible to the public through our free online data bank and Vital Signs reports
- 4 Catalyzes collaborative action toward positive impact on needs identified by Vital Signs

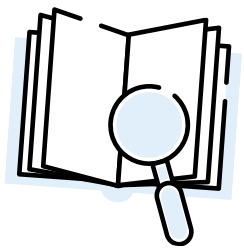


Visit pecdata.ca to view the online databank and previous Vital Signs reports.

Vital Signs is an integral part of the work we do at The County Foundation. Vital Signs® is Canada's most extensive community-driven data program. Prince Edward County's version is led by The County Foundation in coordination with Community Foundations of Canada, offering a consolidated snapshot of key community trends and issues.

Donations to Vital Signs provide resources for research & reports, community engagement, and expanding community awareness.

Vital Signs has initiated collective action on priorities such as food security, education, public transportation, and more.



PRINCE EDWARD COUNTY'S
VitalSigns.

The supporters of Vital Signs understand that knowledge is power and that **a well informed community is an empowered community.** Our Vital Signs work lifts up the community as a whole by enabling targeted interventions that create tangible improvements in our community.



PEC ARTS FUND

The PEC Arts Fund was launched in 2025 with the aim of strengthening Prince Edward County's vibrant arts sector, celebrating the creativity, innovation, and passion of artists who enrich the lives of both our residents and visitors to the County.

Department of Illumination

Support the Arts in Prince Edward County through the PEC Arts Fund

Maximize Your Impact

Direct your support to 1 spot and rest easy knowing your support is helping multiple arts organizations across our community

Grow Together

By contributing to a pooled fund, your donation goes further than it could on its own, continuing to grow over time, leading to more sustainable funding for the arts.



Regent Theatre
Logan Somers



The County
PRINCE EDWARD COUNTY • ONTARIO

The PEC Arts Fund leverages municipal funding and external donations to provide greater support for the arts in our community.

Together we can provide sustainable support for the arts!



Quintissimo
Vi Woo

Support a Transparent & Fair Process

Each year, there is an annual, open call for applications, and final decisions on grants are made in a fair process by a knowledgeable committee of volunteers.

[Check out the full list of recipient organizations on our website.](#)

“Quintissimo is truly grateful to receive the PEC Arts Fund. This two-year grant enables us to grow our free after-school music program and continue empowering children to reach their full potential.”

Diana Lam, Executive Director of Quintissimo



County Stage Company
Seanna Kennedy Photography

Let's invest in the arts – and in the spirit that brings us all together.

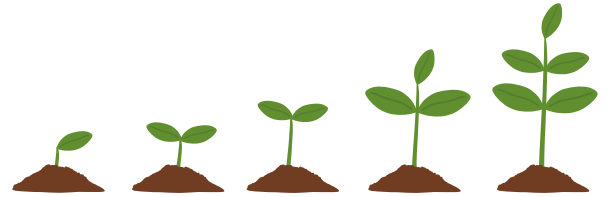
SETTING UP A NEW FUND

Leave your mark through meaningful giving

By setting up a fund at The County Foundation, we make giving back to your community easy. We take care of the set up and administration allowing you to focus on greater impact.

Enjoy supporting the causes and charities that you care about as **our team guides you every step of the way** and while your funds are thoughtfully invested for lasting benefit.

The minimum investment to start a donor advised fund is \$25,000 with a 5+ year time horizon.



Establishing a Fund Agreement (and what is that?)

We start with a conversation to get to know you and your goals. From there, we develop a Fund Agreement to ensure we are honouring your intentions. The agreement clarifies our role and responsibilities, and ensures the gift meets legal and fiduciary requirements.

As a Fund Holder, we provide you with the following services:

- Annual Fund Reporting
- Charitable Giving Expertise
- Prudent Asset Management
- Granting Support & Grantmaking Expertise
- Local Knowledge
- Stakeholder Events
- CRA Reporting & Filing
- TCF's Annual Review
- Vital Signs data
- Expressions of Interest from Community Organizations

In 2024, our administrative ratio was **2.86%** and comparable foundations servicing similar community sizes range between 3-5%



Expressions of Interest: Connecting Donors to Community Needs & Local Organizations

Local registered charities can be submit an expression of interest to our Donor Advised Funds to share their current needs. This is one way we bring organizations and donors together.

This is an excellent way to learn more about the needs in our community and can introduce you to new causes and organizations.

If you would like to discuss the process of setting up a fund or would like to learn more, please connect with our Executive Director (ed@thecountyfoundation.ca)

BEQUESTS & PLANNED GIVING

Your Gift Today, A Brighter Tomorrow

By including a gift to The County Foundation in your Will, you can shape the future of Prince Edward County for the better. This ensures your generosity will continue to make a significant difference in our community.

Bequests are gifts that are made as part of a Will. Most of us (at some point) will go through the process of creating or updating a Will. A bequest is a direction that you put in your Will that says you would like to give a donation and you get to decide what that looks like.

Benefits of giving through your Will

Tax Efficiencies

Charitable giving through your will and estate can create tax efficiencies, a shared benefit for you and the charity you choose to support.

Easy Process

Everyone, regardless of income or assets, should have a Will. Setting up a charitable gift through a lawyer or financial advisor involves a simple conversation and adding a few sentences to your Will.

You Can Give More

Giving through your estate provides you with the ability to contribute to the causes closest to your heart in a way that surpasses what was possible during your lifetime.

Let's make a plan together

You don't actually have to tell us you plan to give to The County Foundation, but speaking to us in advance can help us to be prepared and ensure we are honouring your intentions for the gift.

We can work with you to develop a **Memorandum of Understanding (MOU)** to record your intentions and expectations. Nothing in the MOU legally binds you to make a gift. In the MOU, you can dictate if you want to contribute toward an existing fund or establish a new fund. You can tell us what charities or causes you want to support. **We can help you develop your giving plan to ensure we respect your wishes and provide guidance every step of the way.**

"I need to help my family, so I can't leave a gift to a charity in my Will"

You can leave a percentage of your Estate to a charity after providing for your family, which supports your family and the causes that you care about.



If you would like to discuss leaving a gift to The County Foundation in your Will then please connect with our Executive Director (ed@thecountyfoundation.ca)

You can visit our website for additional resources including our **Professional Advisors Guide** or to find **sample Will clauses** for The County Foundation.

<https://www.thecountyfoundation.ca/giving/bequests-and-endowments>

Have a lasting impact

The Vital Impact Fund could not be possible without the **visionary support of two bequests** that were received by The County Foundation to support the needs of Prince Edward County. These funds will be granted to community initiatives that strengthen the community.



Leaving a bequest to The County Foundation ensures that you have a lasting impact and legacy that fosters a stronger community.

Wynne Thomas



Wynne Thomas, a man of remarkable intellect, wit, and charm, passed away in April 2022, in Picton, just shy of his 95th birthday. Wynne's career in journalism and communications spanned continents.

After retiring to Prince Edward County in the late 1990s, Wynne and his wife, Barbara Moon, embraced community life with enthusiasm.

Known for his engaging conversations and warm hospitality, he lived his final years in Picton surrounded by books, art, and friends. **Wynne's life was a testament to the joy of giving back**, inspiring all who knew him, and we are honoured to continue this tradition through his bequest to The County Foundation that supports grants through The Vital Impact Fund.

Doug and Kathy MacPherson

Douglas and Kathy **shared a life defined by love, hospitality, and meaningful contributions to their community.** Kathy's warmth and talents as a Master Gardener and exceptional cook complemented Doug's passion for community engagement.

Doug's influence was felt widely in Prince Edward County. **He was instrumental in founding The County Foundation**, played a significant role in restoring the Regent Theatre, and was a key supporter of the Prince Edward County Jazz Festival.

Their legacy of hospitality, creativity, and civic engagement continues to inspire those who call Prince Edward County home. Their bequest to The County Foundation supports granting through the Vital Impact Fund and also provides annually three scholarships to students pursuing studies in arts/science, skilled trades and agriculture.



WAYS TO GIVE: PLENTY OF OPTIONS TO HAVE A POSITIVE IMPACT

Options to Give Now



Online

It is very common for people to choose to make donations online. Visit our CanadaHelps page and you can donate to an existing fund.

We can accept Interac e-Transfers sent to info@thecountyfoundation.ca. Please indicate which fund you wish to contribute to in the note section.



Cheque

Make payable to "The County Foundation" and write the fund name in the memo. Our mailing address is 24-35 Bridge Street, Picton, ON K0K 2T0.



[Give Online Now](#)



Publicly Traded Securities

In-kind donations of publicly traded shares entitle you to a tax receipt equal to the fair market value (FMV) of the securities being donated. When publicly listed securities are donated to us, the tax on capital gain is eliminated.

Options to Give Later



Bequests

A bequest is a direction that you put in your Will that says you would like to give a donation and you get to decide what that looks like.

It doesn't have to be one or the other. You can plan for the future and give today so you can enjoy seeing the impact.



Life Insurance

Provide a significant gift at an affordable cost through your life insurance policy without impacting what you leave to loved ones. By naming us as the beneficiary of an existing life insurance policy, or by starting a new one, you can create a meaningful future gift.



RRSP & Mutual Funds

Name us as the beneficiary of your Registered Retirement Savings Plan, Registered Retirement Income Fund or Tax Free Savings Account and make a significant donation, while avoiding to pay the Estate Administration Tax.



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A proud member of



**COMMUNITY
FOUNDATIONS
OF CANADA**

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