



YOUR LEGACY TO

*charitable giving*

THE QUADRUS CHARITABLE GIVING PROGRAM

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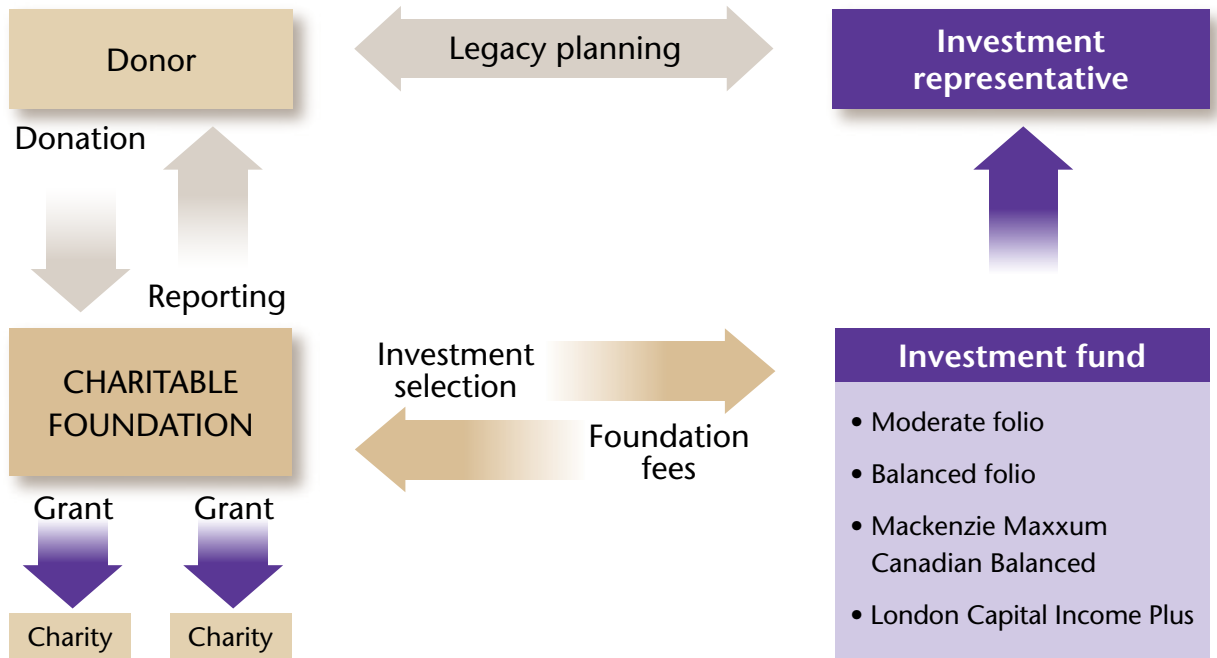
Q U A D R U S

Achieving your philanthropic goals is important to you.

You feel compassion towards people in need and want to give to a cause in which you personally believe.

You want to maximize the impact of your giving...

*you want to make a difference.*



## PROGRAM DETAILS

Minimum contribution:	\$25,000
Minimum additional contribution:	\$5,000
Minimum grant:	\$500
Eligible assets for donation:	Cash Most publicly traded securities Mutual funds Life insurance Segregated fund policies

Investment options:	Moderate Folio Fund Balanced Folio Fund Mackenzie Maxxum Canadian Balanced Fund London Capital Income Plus Fund
Foundation fees:	1 per cent on the first \$500,000 .85 per cent on the next \$1 million .75 per cent on the next \$1 million Negotiable over \$2.5 million

Complete details are available in the program guide

## UNDERSTAND THE PROGRAM WITH THESE EASY STEPS

*step* 1

### **Plan for a legacy.**

Through a conversation with your Quadrus investment representative, you can choose to establish a donor-advised fund – your personal charitable giving program.

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*step* 2

### **Donate.**

An initial donation of cash and/or most publicly traded securities establishes your program. You receive a tax receipt equal to the value of the donation.

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*step* 3

### **Name the account.**

You may name your own account – for example, John Doe might choose “The Doe Family Fund”.

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*step* 4

### **Receive reporting.**

Each year, the foundation advises you, the “donor-advisor”, of the amount your account has available to grant to charities (minimum grant required).

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*step* 5

### **Make grants to charity.**

You recommend which among registered Canadian charities should receive the amount available to grant.

And once the program has been established:

*step* 6

### **Add to the program.**

You may add to your program at any time (minimum additional contribution \$5,000) as well as make a bequest gift in your will.

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*step* 7

### **Continue with a successor.**

You may name successors (e.g. children) who would make granting decisions upon your death or in the event of incapacity.

# YOUR PHILANTHROPIC GOALS... AN INNOVATIVE PHILANTHROPIC SOLUTION

Reaching your philanthropic goals isn't always a simple matter. Common solutions may not be a comfortable fit for you. If that's the case, trying to make them fit could lead to frustration. Ultimately, that may mean your favourite charities and social causes aren't receiving the kind of support you want to give them.

## What is getting in the way?

You most likely already have a general plan for supporting your favourite charities and causes. Perhaps electing an agreeable method of executing the plan has proven disappointing.

There could be a number of challenges:

- You may want a “private foundation” experience, but have discovered set-up costs, ongoing expenses, time commitments and regulatory requirements make this option too costly and complex.
- You may be feeling your charitable giving isn't focused and consolidated, since it lacks a solid long-term plan to help you execute your philanthropic goals.
- With all of the options available today, you may find just choosing the appropriate method for executing your philanthropic goals has become complex and time-consuming.



## The Quadrus charitable giving program can help you overcome these challenges

Here's how. Use the Quadrus charitable giving program to:

### **Simplify charitable giving**

Your charitable giving efforts are simplified because your gifts can be consolidated into an easy-to-maintain program. Through this program, you can enjoy the experience and legacy of a charitable foundation without the prohibitive cost and complexity. And with the Quadrus charitable giving program, you can set things up in days, versus the months it takes with a private foundation.

### **Leave a legacy**

You can make a long-term commitment to supporting charities in which you believe and, by naming successors, continue to make a difference with charitable giving indefinitely through your heirs.

### **Give perpetually**

Give more and give longer. One donation can ensure your gift lives on in perpetuity as it grows and gives annually within a professionally-managed investment portfolio.

### **Take control**

The Quadrus charitable giving program means flexibility and simplicity. You and your successors can recommend which charities will receive your gift year after year, as well as the investments in which your donations are invested.

### **Enjoy tax advantages**

Contributions to the Quadrus charitable giving program provide an immediate tax credit.



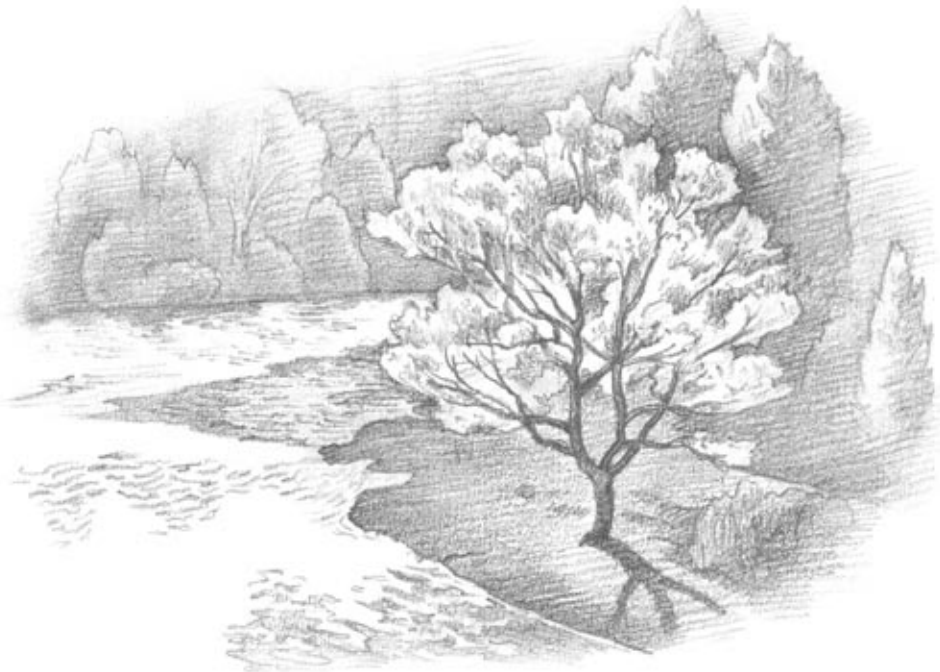
## A SIMPLE, CONVENIENT SOLUTION

### The Quadrus charitable giving program: What it is and how it works

The Quadrus charitable giving program is a “donor-advised fund”. A donor-advised fund is a simple vehicle that facilitates philanthropy without the administrative responsibilities or costs associated with a private foundation.

The program is designed to make giving a regular part of your overall financial security plan. It is a simple and convenient solution that gives you the ability to support your favourite charities now and in the future.

A donor-advised fund is a fund established within a foundation. The donor receives an immediate tax receipt for all contributions but retains the right to advise the foundation on how the income is to be allocated. At the time the fund is established, the donor can name the fund and the charitable organization or causes that the fund will support.



# ESTABLISH YOUR LEGACY TO CHARITABLE GIVING

Make a difference for the causes you support. Talk to your Quadrus investment representative about how the Quadrus charitable giving program can help you achieve your philanthropic goals.

**QUADRUS**

Quadrus Investment Services Ltd.



## QUADRUS ■ GROUP OF FUNDS

Make your investment decisions wisely. Commissions, trailing commissions, management fees and expenses all may be associated with mutual funds. A charitable administration fee and charitable operating expenses will also apply. Please read the prospectus before investing, and the program guide before donating. Mutual funds are not guaranteed, their values change frequently and past performance may not be repeated. The information is general in nature and is not intended to be professional tax advice. Donations should not be made for tax considerations alone. Each donor's situation is unique and advice should be received from an investment representative.

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