

# A Year in the Life of Your Fund

## April

The beginning of the Foundation's fiscal year.

## June

You can expect to receive your first quarterly update of the fiscal year. Included you will find: an update on the Foundation's investment pool performance; a copy of your annual Fund Statement, which provides the amount you have available to grant this fiscal year; a list of your grant history from the previous year; as well as our latest annual report.

We celebrate all that makes Toronto a vibrant city with our annual Vital Toronto event. Bring your family and friends – we promise you'll leave inspired!

## August

We'll send you the second quarterly update on the investment pool performance.

## October

We release our Toronto's Vital Signs® Report, our annual snapshot of the quality of life of our city. Many Fundholders find it a valuable tool in understanding the areas of greatest need in our community.

We'll send you another quarterly update on the investment pool performance, your own copy of the Toronto's Vital Signs® Report, and other news of Foundation activities.



Keep an eye on your inbox for our monthly e-newsletter *The Connection*, which will help keep you up-to-date and well-informed!

## December

The holidays are a natural time to think about your philanthropy. You may be thinking of making a donation to your Fund or contributing to the Vital Toronto Fund. To receive a charitable donation tax receipt for that calendar year, please make sure we receive the donation on or before December 31st. You may also wish to make grants from your Fund to any of your favourite charities. Please let us know early in the month to ensure timely processing.

## February

We'll be in touch to remind you of your "available to grant" balance. You're under no pressure to grant, of course, but if you'd like any assistance, please feel free to contact us!

You'll also receive the last quarterly update of the fiscal year on the investment pool performance, as well as our annual update on the Vital Toronto Fund.

## March

As we wrap up the fiscal year, we ask you to send us your grant recommendations by mid-March to ensure timely processing. But not to worry – if you don't get them in to us by then, we'd be happy to process them later in April.



There are opportunities available to participate on our grant selection committees throughout the year; please contact us if you're interested in this very engaging experience!