



Your legacy can
be their future

Endowments



Plan

Plan to change
the world



What is an endowment fund?

An endowment is a long-term fund in which the donation is preserved and invested by Plan Canada, and the investment income is distributed to support Plan's programs year after year.

Benefits of endowment funds:

- You can establish an endowment fund in your lifetime with a one-time donation, by making a pledge over time or through a bequest (a gift made in your will).
- You will receive a donation receipt for each gift you make.
- Endowment funds are ideal for donors who wish their gift to benefit the lives of children today, and for years to come.
- Plan Canada will work with you to establish a named endowment fund that is tailored to meet your philanthropic goals.



Why establish an endowment fund with Plan Canada?

In over 75 years, Plan has built a reputation as one of the world's most effective and responsible development agencies. We have a proud tradition of operating with transparency to maintain the trust of our donors and partners, and we regularly undertake internal and external audits of our programs' effectiveness. We were among the first charitable organizations to be accredited by Imagine Canada's Standards Program. We also adhere to their Ethical Fundraising and Financial Accountability Code, and support the Association of Fundraising Professionals' Donor Bill of Rights.

Endowment funds are an important part of planning future development work. Being aware of the funds that will become available allows us to better plan long-term, life-changing projects.

Plan's vision is a world in which all children can realize their full potential in societies that respect people's rights and dignities. By making an endowment gift to Plan Canada, you'll be leaving a permanent legacy of hope, helping break the cycle of poverty for children today and for generations to come.



Named endowment funds

A named endowment fund helps perpetuate your values while providing assurance that the Plan programs that are important to you will survive over time. By creating or adding to a named endowment fund for a designated purpose, Plan can carry out your wishes and uphold your legacy.

- For a minimum contribution of \$25,000, you may establish a named endowment fund. An initial gift of \$5,000 is required with the balance paid over the next five years.
- Your named endowment fund can be directed toward Child Sponsorship, or one of our core areas of work, such as water, education, or health, or our **Because I am a Girl** Endowment Fund which supports girl-focused programs.

Once your named endowment fund has been established, you will receive annual reports detailing the growth and disbursements of your investment and the direct social impact your investment is making in developing countries.

Endowment gifts under \$25,000 will be invested in a pooled Plan Canada or **Because I am a Girl** Endowment Fund. Income payouts from the Plan Endowment Fund are directed to the area of greatest need and payouts from the **Because I am a Girl** Endowment Fund go to girl-focused programming.

About Plan

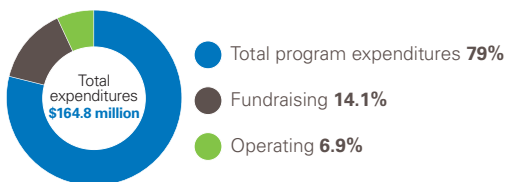
Founded in 1937, Plan is one of the world's oldest and largest international development agencies, working in partnership with millions of people around the world to end global poverty. Not for profit, independent and inclusive of all faiths and cultures, Plan has only one agenda: to improve the lives of children. **Because I am a Girl** is Plan's global initiative to end gender inequality, promote girls' rights and lift millions of girls – and everyone around them – out of poverty.

We are committed to ensuring the maximum amount of money possible goes to programs that directly benefit children. Over the past five years, we have kept the costs of fundraising and operations at an average of 21 cents for each dollar raised – the remaining 79 cents is devoted to programs.

2013 REVENUE SOURCES



2013 EXPENDITURES





Contribute to lasting change

Plan International aims to achieve lasting improvements in the quality of life of children, families and communities in developing countries. Our Child Centred Community Development approach helps millions of children learn about their rights and take an active role in community development.

You can be part of this transformative impact by making an endowment gift to Plan Canada.

An endowment fund is one of the most effective ways to impart your values into the future. Through Plan, its impact extends to the many children and families in the more than 90,200 communities where we work, across 50 developing countries.



Investment policy and management

The Endowment Fund's primary objective is to maximize return commensurate with a conservative level of risk. The disbursement of Plan Canada's Endowment Fund is determined annually.

Plan Canada's Endowment Fund's investments are managed by TD Waterhouse. The Board of Directors of Plan Canada has ultimate responsibility and decision-making authority for the Fund's investments with recommendation from the Finance, Audit and Compensation Committee and in adherence to Plan Canada's Endowment and Investment Policies.



Plan

Learn more and get involved at plancanada.ca



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