



Philantra
Foundation™

For long-term support of causes that are important to you

To help you truly integrate your most cherished values into your overall financial and estate planning, we have created the Philantra™ Foundation.

Philantra is more than just a donation

The Philantra Foundation, a not-for-profit corporation and a registered charity with the Canada Revenue Agency, is a public foundation (number 78854 010 RR0001). Its purpose is to encourage the development of philanthropy through the creation of charitable funds that will allow you to provide long-term support for causes or organizations that are important to you.

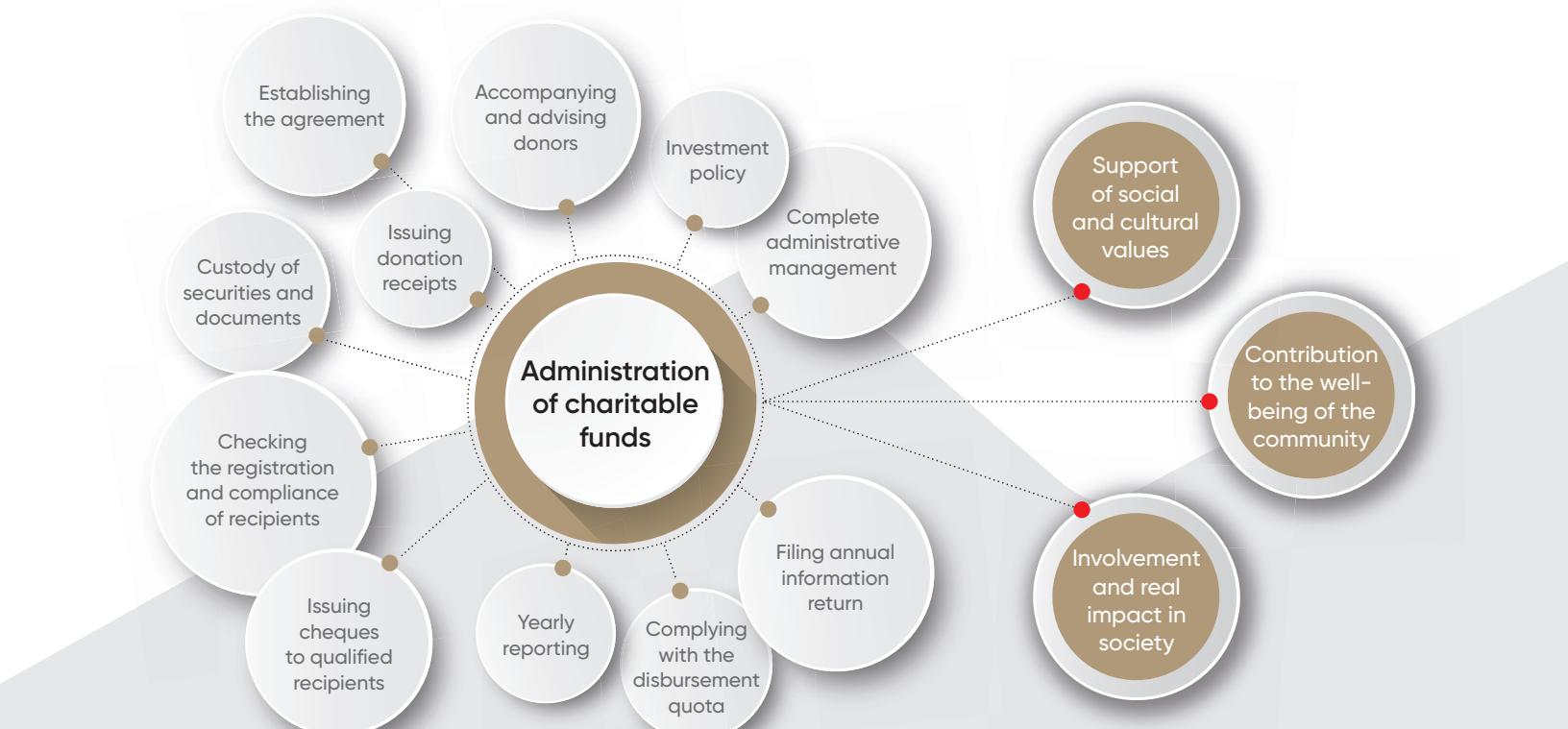
While a private foundation is generally established by a single donor with a substantial donation, a public foundation brings together several donors. With the Philantra Foundation, you can create your own personalized charitable fund within this public foundation without having to worry about the costs, delays and administrative complexity associated with creating and managing a private foundation. This makes it easy for you to support different causes over time, such as culture, the arts, research or any other purpose that benefits the community.

A complete approach and specialized support

The Philantra Foundation promotes the integration of your long-term philanthropic vision into your overall financial and estate planning, and offers many benefits:

- > Support from seasoned experts to assess your ability to give and optimize your donations from a financial, tax and estate perspective
- > Possibility of remaining anonymous or establishing your charitable fund in your name
- > Creation of a fund in perpetuity or for a specified period
- > Establishment of a fund tailored to your philanthropic objectives
- > Support in choosing the organizations that best align with your values
- > Flexibility in selecting and changing the causes and organizations you wish to support
- > Several forms of potential donations (cash, life insurance, securities and mutual funds)
- > The choice of several investment vehicles adapted to the intended purposes
- > A complete, simple and efficient approach to administrative management
- > Eligibility to claim both a tax credit and a capital gains exemption (a tax receipt is issued at the time of the donation to the foundation, rather than when the foundation makes grants to designated organizations.)

Our services



Is the Philantra Foundation right for you?

The Philantra Foundation can be useful in your financial and estate planning if, for example, you:

- > Make donations annually or on a regular basis
- > Consider donating a substantial capital during your lifetime or at your death, with a long-term perspective
- > Would like to consolidate all your donations into one fund while supporting a variety of organizations
- > Wish your memory to be preserved or your work to outlive you
- > Wish to involve your family or establish an intergenerational philanthropic tradition
- > Are interested in the immediate tax benefits of a donation



TM The Philantra Foundation ("Philantra") is a registered charity (78854 0110 RR0001) and a non-profit company legally constituted under the Canada Not-for-Profit Corporation Act, operating independently from National Bank of Canada (NBC) and its subsidiaries. Certain NBC subsidiaries, in particular, National Bank Trust Inc. (NBT) and National Bank Financial Inc. (NBF), through its Wealth Management and Private Banking 1859 divisions, provide administrative and operational services for the general administration of the property of Philantra. National Bank – Private Banking 1859, National Bank Trust and National Bank Financial – Wealth Management are trademarks owned by NBC, used under licence by Philantra.

© 2020 Philantra Foundation. All rights reserved. Any reproduction in whole or in part is forbidden without prior consent from Philantra Foundation.

31564-002 (2020/05)