

BUILDING A LEGACY FOR YOUR COMMUNITY

The earnings from the general community fund are used to provide grants to a wide range of organizations.

OUR VISION

That our entire community, our people and our prosperity, continue to grow in healthy and hearty ways.

OUR MISSION

By identifying and understanding our community's needs, creating and maintaining partnerships that support effective solutions, and engaging and stewarding caring investors who fund our endowments and our grants, we are growing our entire community.

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Board of Directors

The Morris Area Foundation Inc. Board of Directors is a broad based volunteer-driven organization that brings local knowledge and experience and a network of area relationships to its board.



Curtis Evenson – Chair

Curtis has been on the MAF Board since the start in 2014 and was pleased to be elected Chair in 2022. He has previously acted as Vice President and the Granting Committee Chair.

Curtis and wife Pat have lived in the Morris area since 1975. He is a retired farmer, and recently retired Program Officer with Manitoba Agriculture. He currently is the administrator of the Manitoba Association of Agricultural Societies. He and Pat have 4 children and 4 grandchildren. Curtis has been involved in various Morris area organizations for well over 40 years.



Dennis Mathies – Vice Chair

Dennis has been a director with the Morris Area Foundation for 3 years. Dennis grew up and lives near the community of Lowe Farm. He recently retired after being employed with Access Credit Union for 41 years. He has been involved with various committees and boards in the credit union system and in the communities of Lowe Farm and Morris.

Dennis spends much of his time in summer working on his yard. He is a motorcycle enthusiast and is a director for the Southern Manitoba Harley Owners Group Chapter and also the coordinator for the groups annual Children's Hospital Foundation of Manitoba Toy Run.



Shelley Stupnisky – Secretary

Shelley and her husband chose Morris and small town life as Home Hardware store owners many years ago. As their children grew, they volunteered with their clubs and with many community organizations. When they sold their business a few years ago, they chose to remain in Morris and continue their volunteer commitment. Shelley has been a director with MAF for 5 years, 3 years as secretary and also serves as liaison with the Youth In Philanthropy group. She enjoys participating in community events to educate and encourage gifts to the Morris Area Foundation.

OUR VALUES

Commitment

We give our time and energy to support the growth of our community foundation and, in turn, our entire community.

Thoughtfulness

We place effort into understanding our community's needs before making decisions and taking action.

Support

We provide assistance to the local charities and organizations that are helping our community grow.

Integrity

We follow a code of especially moral values, of honesty, and of accountability.

Courage

We persevere, in the face of challenges, as we undertake our work as a community foundation.

Inclusiveness

We invite participation by all members of our community, and actively seek their input and perspective in helping us achieve our goals.



Midge Anderson - Treasurer

Midge has been with the Morris Area Foundation Board since its birth in 2012 and is the current Treasurer. She believes strongly in the concepts of community foundations and the benefits to communities.

Prior to her retirement, she worked in the Municipal field, as CAO of the Town of Morris and acted as a consultant for numerous Manitoba municipalities.

Midge is a long-time resident of Morris who has been volunteering in the community for many years.

Midge enjoys family, travelling, gardening, wood carving, and her cottage - where every day is an adventure!



Brendan Heppner – Director

Brendan was born and raised in Winkler, MB and then started his insurance career at Rempel Insurance Brokers in Morris in 2007. During this time he played hockey for the Pembina Valley Twisters (MMJHL) in Morris and started to get involved with volunteering in various different events within the community. He has been working for Rempel Insurance Brokers for over 15 years and continues to play hockey on multiple different teams.

Brendan has been a director with the Morris Area Foundation for over 3 years. In his spare time he enjoys playing hockey, golf, tennis and baseball. He also enjoys going to the cabin in the summer time and snowmobiling in the winter.



Del Stevenson – Director

Del was born and raised in the Morris area. After graduating from Morris Collegiate, he worked in the banking field at various locations in Manitoba and Saskatchewan before returning "home" in 1974.

Del retired in 2004 after 24 years with Access Credit Union. He worked along with other founding members to establish the MAF and has served as Chair from 2015 to 2022.

He enjoys the outdoors, spending time in the summers at the cabin on the Lake of the Woods.



Bruce D. Gregory – Director

Bruce Gregory has engaged in the general practice of law continuously since his call to the bar. Bruce graduated from the University of Winnipeg with a Bachelor of Arts degree (majoring in economics) and from the University of Manitoba with a Bachelor of Laws degree.

Bruce has been an active member in the Morris community for many years. He has served on several boards, including the Morris Chamber of Commerce and the Morris Community Development Corporation. Bruce enjoys outdoor activities, especially running, kayaking, fishing and skiing.



Chris Hamblin – Town of Morris Rep

Chris grew up in Dauphin but has considered Morris home since 1975 when she married Lorne. She and Lorne have farmed in the area and raised their family here. They have 3 sons and 10 grandchildren. Chris and Lorne are also trainers and coaches of curling having coached in provincial, national, and international events including Vancouver Olympics in 2010, and the 2015 Deaflympics in Khanty-Mansiysk, Russia.

Chris has a degree in home economics and a certificate in education. She has a multitude of experiences in local, provincial, and national boards. She is passionate about the Morris Area Foundation and is looking forward to working with MAF to continue to grow the Foundation's assets for the betterment of the area.



Cory Friesen – RM of Morris Rep

Cory Friesen represents the Rural Municipality of Morris on the Morris Area Foundation. Cory has been a councillor for the RM of Morris since November 2022. As a long-time resident in the rural municipalities of Manitoba, Cory grew up in Altona area with the last 14 years residing in Lowe Farm with his wife Kelly and daughter Chloe. Cory is dedicated to rural living and community development.

Cory's career in the insurance industry has spanned over 22 years. In addition to holding a position as a corporate information technology manager, he serves as a commercial, church, and charity account manager offering insurance products for churches, Christian schools, bible colleges, seminaries, Christian campgrounds, counselling centres and missions' organizations. Included in his years of leadership, both in his career and in a church volunteer capacity, are ten years as a church board member.

Cory enjoys spending time with his family, sightseeing, travelling, and having a good patio dinner!



Lynda Lambert – Community Foundations Coordinator, Endow MB - South Central Region

Lynda has worked within the community foundation movement since 2014 with the Morden Area Foundation. Lynda joined the Endow Manitoba team October 2020 and the Morris Area Foundation (MAF) team as at October 1, 2020. Lynda works directly with four community foundations including Steinbach, Morris, Plum Coulee, Manitou, and Morden. Lynda is very passionate about community foundation work and is very excited to be part of the movement and working with the Morris Area Foundation.

Lynda has been hired through Endow Manitoba's Regional Staff Program to bring sustainable human resource capacity to Manitoba community foundations. For the first five (5) years of the program, Endow Manitoba will subsidize 50% of the salary/benefits and 100% administrative expenses.

Lynda lives in Morden, MB, enjoys riding motorcycle, fancies herself as an artist through painting and sewing, and loves hosting dinner parties with friends and family.



Jackie Murray

Jackie Murray was born and raised in Morris, Manitoba and has always been engaged in giving back to her hometown community. She holds a Certificate in Public Sector Management and a Masters Degree in Public Administration.

Jackie has a 21 year career in the pharmaceutical industry. She is a Senior Territory Manager with Abbot Diabetes Care. Prior to this position, she was with Lifescan - Johnson and Johnson's medical device company. Here, in addition to her role as a Senior Territory Manager, she held the Manitoba Government Relations portfolio for 15 years. Jackie worked as a Policy Analyst with The Manitoba Women's Directorate and the Policy Management Secretariat of the Premier's Office. Jackie is heavily involved in volunteering with The Juvenile Diabetes Research Foundation and serves on the Animal Welfare Appeals Board with the Province of Manitoba.

Ways to Donate

Publicly listed securities

To get an added tax advantage, you may donate securities listed on specific stock exchanges, mutual funds and segregated funds instead of cash. Under a recent change to the Income Tax Act, the effective taxable capital gain from the disposal of the security will be zero instead of one-half.

Bequests of life insurance or registered plans

You can donate the proceeds upon death from a life insurance policy, RRSP, RRIF or TFSA by naming the charity as the beneficiary, or by naming the estate as the beneficiary and naming the charity in the will to receive the proceeds.

Such charitable gifts are treated as if they were made in the year of your death and are eligible in determining the charitable donation tax credit on your final tax return or the immediately preceding return.



It has been a pleasure to serve as MAF Chair this past year. I would like to thank all our board members for their support and contributions to MAF over the last year and previously. Everyone has lent their skills to the running of the organization. It certainly takes a dedicated team.

Again, this year the MAF Board is overwhelmed by the support the Foundation has received. In total approximately \$75,000 was contributed to the General Endowment Fund, our new Administration Fund and the Health and Wellness Fund. Thank you to all that have given your support. Your gifts become a legacy to our area. Your initial gift remains with the foundation in perpetuity while the interest earned on your investment is used to partner in funding worthwhile projects in our area. Your gift will last forever – for good! A great investment in your community.

The MAF is making a difference for our area. Since we started offering grants in 2015, the Morris Area Foundation through its partnerships with the Thomas Sill Foundation, The Winnipeg Foundation, Endow Manitoba, the Province of Manitoba, Community Foundations of Canada, area businesses and individuals has returned approximately \$150,000 to our area. We are striving to become a trusted, reliable, and predictable source of funding to assist in meeting our community's needs.

CHAIR'S REPORT

The Gift that truly keeps on giving to your community!

Other than starting the Morris Area Foundation in the first place, likely the next best decision was to become involved in the Endow Manitoba Shared Staff Program. Endow Manitoba greatly subsidizes the cost under the Shared Staff Program. The MAF has the benefit of Lynda Lambert's expertise for one half day per week. Of course, it amounts to much more than that.

Lynda is far from being new to community foundations. Starting in 2014 in Morden, her knowledge of and input into our Bylaws, policies, board reports format, board member recruitment process, new accounting system and other areas has made a huge difference for the MAF. We currently share Lynda's time with Morden, Manitou, Plum Coulee, and Steinbach.

The Morris Area Foundation board has been involved in outside learning opportunities. Several board members were pleased to attend the Endow Manitoba Conference in Winnipeg in October. Meeting and hearing from other community foundations from around the province was inspiring and educational. Speakers reinforced the need to constantly engage with your community, including the current and potential donors and grant recipients to grow your foundation's impact. We are in it for the long term!

As you know we added an event in December last year with great success. We are trying to increase the interaction with our area. If you have suggestions to increase awareness, your MAF Board will be pleased to hear them.

The Gift that truly keeps on giving to your community!

2022 MAF Grant Committee Report

On Tuesday, December 13, MAF hosted our first annual **Granting Awards Celebration** at the Morris Multiplex. This celebration of community was exceptionally well received with around 60 guests braving a winter storm to attend. The evening provided opportunity to learn about past successful MAF projects that have had great impact on our communities and celebrate with the grant recipients of 2022, announced that night. MAF shared how they invest in community by showcasing various organizations and projects receiving support and thanked all the donors for their gifts to the Foundation.



2022 Morris Area Foundation Grant Recipients. Granting Committee Chair, Dennis Matthies was pleased to report MAF was able to assist nine groups in the MAF area this year for a total of \$17,000. Individual grant recipients and project descriptions for 2022 are:



Morris Community Gardens - The Morris Community Gardens project received a total of \$2,500 over the years 2021 and 2022 to assist in the replacement of 12 aging wooden raised

garden boxes with 14 long lasting maintenance free galvanized boxes. Six boxes were replaced previously also with the assistance of the MAF. Since 2016 the boxes have been used primarily by Red River Valley Food Bank clients for their own food production and in some cases donated back to the Food Bank. The Garden is located on property owned by the Morris United Church on PTH 23 in Morris

Morris Manor

The Morris Manor was granted \$1,000 to assist in the updating of the existing florescent lighting to new LED brighter and more energy efficient lighting plus replacement of the existing smoke alarms. The Morris Manor Ltd. is a 19 apartment, 55 plus affordable rental housing in Morris. Over the last few years this residence has been radically updated by a group of very motivated volunteers and board members.

Morris & District Centennial Museum

A grant of \$1,000 was awarded to the Morris & District Centennial Museum to assist with badly needed roof repairs. The Museum, established in 1986, consists of two separate buildings with a covered walkway between them. Recently the walkway roof began leaking and needs replacement. Run by a group of dedicated volunteers, the Museum houses countless priceless articles of historical significance from the area.

Low Farm Community Centre District

The Low Farm Community Centre District, whose purpose is to provide recreational and cultural services to the Low Farm area was provided a grant of \$2,000 to help in the construction of a Zamboni Shed. Currently the Zamboni is housed off site at a private facility. The new heated shed adjacent to the skating rink will provide ease of access and use for the committee, providing better ice and more usage of the skating rink.

Morris Early Learning Centres

With their mission to help children reach their full developmental potential and to be inclusive, the Morris Early Learning Centre received a contribution from the MAF of \$500 to purchase floor hockey equipment for use in their facilities. As some children already play hockey outside the Centres, this equipment will allow those children to share their interest with children not currently involved in the sport. The MELC is a childcare centre that provides educational programming to children ages 0 to 12 years of age, to children from Morris and areas outside.

Red River Wellness Committee

Established in 2021 to enhance and strengthen outdoor recreation facilities within the Town of Morris and

THE MAF HAS SUPPORTED A WIDE VARIETY OF PROJECTS

surrounding communities, the Red River Wellness Committee received a contribution of \$3,500 to assist in the rehabilitation of the 20-year-old multisport courts located on the Morris School grounds. The plan is to increase their use and make them accessible to all residents regardless of age or ability for outdoor sports like pickle ball, basketball, or tennis.

Red River Valley Food Bank



It takes a lot of volunteers to run a food bank.

In 2022, The Morris Area Foundation was pleased to provide the Red River Valley Food Bank a grant of \$500.00 to purchase a portable air filtration system for the Food Bank work area. Chairperson Pat Rempel says, "The new system has made a huge difference in the improvement of air quality for the many volunteer workers at their Morris location on Boyne Ave. The Food Bank has experienced a significant increase in the number of families served and the cost of food they provide. Now serving on the average 95 families per month from the Town and RMs of Morris and Montcalm."

Willow Park Committee

Willow Park Committee received a contribution of \$5,000 to assist in their aim to revitalize the existing Willow Park playground. Their objective is to create a unique and significant attraction destination park to new events for community members and others from the surrounding area.

Youth in Philanthropy Program

The Youth in Philanthropy (YIP) program, now in its 6th year at the Rosenort and Morris Schools received \$2,500 between them for their granting program. The students have the responsibility to publicize their program, receive grant applications, analyze the requests, meet the applicants, and learn about the charitable sector in their communities.

Reports on Previously Funded Projects



Heart Team Inc. Hovercraft Project

In 2021 the Morris Area Foundation granted \$2,000 to the Heart Team Inc. – Rescue Hovercraft Purchase. Facing issues with securing a hovercraft from outside the country, The Heart Team instead chose an even better suited Canadian secured airboat.

Paul Maendel of the HEART Team says "Every year our waters claim countless victims, many of which are not recovered, leaving behind unanswered questions and heartache. HEART specializes in finding and recovering

drowning victims using state of the art equipment and a highly-trained diving crew. As a non-profit, charitable organization, we rely heavily on sponsorship and donations to continue to provide the necessary training and equipment required to do our job to the best of our abilities.”

Habit For Humanity Manitoba – Rosenort Home Build Project

The Morris Area Foundation (MAF) made a grant of \$2,500 in 2021 to Habitat for Humanity – Rosenort Home Build project



Parents: Mustaf & Magda Children: Daughters: Amina (2002), Mariam (2004), Fatima (2016), Aisha (2020) Sons: Abdullaah (2007), Yusuf (2009)

Mustaf is originally from Somalia and his wife Magda originally from Poland. They met in Canada about twenty years ago while living in Edmonton. They moved to Winnipeg 10 years ago.

Mustaf is a long haul driver and is away from the home 2-4 days per week. His schedule can be unpredictable as his employer will call in the morning to let him know if he is heading out on a trip. Magda graduated from Early Childhood Education and is currently enrolled in a Bachelors of Education program. Magda home schools the children and they are all doing very well. The range in age from 2 years to 20.

When the family applied, they were living in Winnipeg in a two-bedroom basement apartment. Magda is an excellent organizer and was able to make the limited space they had in their 600 sq. ft. apartment work the best way possible. The two youngest children slept in the parents bedroom, the boys slept in the living room in fold out beds and the two oldest girls were in bunkbeds in the second bedroom.

When Magda received the call from Habitat that they had been approved for partnership in the homeownership program, she was speechless, she simply couldn't believe it. Each time she had a conversation about the opportunity, little by little it started to feel real. They have been wanting to live outside the city of Winnipeg to raise their family in a quiet community. They visited Rosenort and were excited to become a part of the community. The children looked forward to having their own rooms and having sleep overs with their friends. Magda's parents live in British Columbia and she is excited to have them come and visit their new home. Magda and Mustaf now have the space for them to stay with them.

The family worked extremely hard completing the required 500 hours. With their dedication and help from their family, Magda, Mustaf completed the hours within 8 months. Both Mustaf and Magda have excellent credit scores and are set up to have success in their homeownership journey. They manage their finances very well, pay off their credit cards every month and have some savings for emergencies. They have proven to have the foundation to be successful with the help of the Habitat affordable homeownership program.

Ways to Donate

Cash Gift

This is the simplest type of monetary gift. But before dropping that cheque in the mail, you may wish to consider alternative giving strategies that can increase the benefits of the donation for you, your charity, and your estate.

Donate Online

Online gifts are processed without charge by The Winnipeg Foundation through the Endow Manitoba website. <https://www.endowmanitoba.ca/make-a-gift/> Select the Morris Area Foundation, and follow the prompts.

Gifts in Kind

These are gifts of property including artwork, securities and real estate. Tax credits for 'gifts in kind' donations are determined by the fair market value of the gift at the time of the donation. However, you must also report any resulting capital gain or loss on the disposition of that property.

YOUTH IN PHILANTHROPY

Morris School



Morris School YIP group presenting grant to Morris Museum, represented by Lou Erickson.

Report submitted by Laurie Edel of the Morris School YIP program. Each year we receive applications from many community organizations. Our goal is to support local organizations that make a positive impact in our community. This year (2021-22), we had several applicants for YIP funding. We discussed the benefits of each organization while considering the funding needs of each organization.

Our first YIP recipient of \$500 is the Morris and District Centennial Museum. The grant application asked for assistance of funds for murals for their stained-glass windows. We chose to give them this bursary because it will benefit the overall historic look and appearance of the museum.

Our last YIP gift of \$819.84 went to the Morris Swimming Pool. The grant application asked for support with the cost of their aqua fit equipment. We chose to give them this bursary because it will help the aqua fit program and benefit all community users of the Morris Pool. We are very excited and thankful to have the opportunity to make these grants to help our local organizations in our community.

As a Youth in Philanthropy group we appreciate being able to support and encourage these organizations as they enhance our community.

Rosenort School



Rosenort School YIP group

Rosenort YIP grants made 2022:

- Habitat for Humanity \$500 towards building a home for a family of 8 in Rosenort
- Rosenort Minor Baseball \$974.33 for construction of backstop at ball diamond
- Rosenort School \$500 for keyboard.

Jannine Sabourin

Grade 7 SS Teacher, Rosenort School



The Youth In Philanthropy Morris/Rosenort Schools group was initiated in 2017 with a three year supporting grant from the Thomas Sill Foundation. Every year the groups disburse \$2500 following the guidelines of the Morris Area Foundation to community groups within the Morris and Rosenort areas. They have funded such diverse projects as outdoor volleyball nets, design of a unique flag for the Morris Museum, broadcast equipment for the Rosenort school broadcast club, wheelchair accessibility for the Youth for Christ building and aquafit equipment for the Morris Pool. The grade 7 to 9 students in Rosenort and grade 10 to 12 students in Morris have definitely made an impact on their communities.

Ways to Donate

Charitable Remainder Trusts

You make a gift to a charity during your lifetime yet continue to receive the income generated by the investments. Through an irrevocable inter vivos trust (known as a Charitable Remainder Trust), the charity you name is established as the capital beneficiary. However, the capital is not accessible to the charity during your lifetime. All interest and dividends earned by the trust are paid to you as taxable income. You receive a charitable receipt equal to the present value of the capital which the charity is expected to receive at the time of your death. The donation is removed from your estate and would not be subject to probate fees or claims by creditors.

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ENDOW MANITOBA GIVING CHALLENGE



Again in 2022, the Morris Area Foundation (MAF) was amazed and humbled with the support we received this year. Although the MAF does receive gifts throughout the year, The Endow Manitoba Giving Challenge is truly the highlight. Endow Manitoba is the arm of The Winnipeg Foundation that supports the work of Manitoba community foundations through research, programming, and grants.

This year's Challenge was held November 14 to the 20th. The Challenge is an opportunity offered by Endow Manitoba and local business. Upon raising \$10,000, The Winnipeg Foundation, the Province of Manitoba, and area businesses Access Credit Union and Rempel Insurance Brokers each contributed \$2,000 each. That's a great way to boost MAF's General Endowment Fund. Who doesn't get excited about an opportunity like that?

For the last several years, Morris Bigway has run a "Round It Up" during the Endow

Manitoba campaign. The Bigway staff at the tills invite customers to "round up" to the next dollar for MAF. This amount has been in turn generously matched by Morris Bigway. Thank you to Pat and the staff for this support over the many years. In 2022, this event added approximately \$2,700 through the Endow Manitoba Challenge.

In total, this year the Morris Area Foundation received gifts during the Challenge to our General Endowment Fund of \$36,633.27. The Endow Manitoba Giving Challenge attracts the most interest because of the matching monies, however, MAF does accept gifts year round and tax receipts are always issued.



The Choice is Yours

Someone once asked ... why should I make a gift to a community foundation when I can make a gift directly to the charity that needs the money? And ... how does a community foundation fit in amongst all the other charities who also have their hand out for money? Well, both are very good questions.

There are three ways of donating or making a gift to your community. Please note: not one of the following options is better than the other, they each offer a different opportunity for donors. Immediate needs, current needs, and legacy or sustainability for future needs.

1. **Charity** – to make a donation to a charity is to address immediate needs of the community. For instance, making a donation to a food bank. Registered charities are organizations with boots on the ground, doing the work, caring for the community in response to immediate needs. Your donation is made once, a receipt is issued, and the money is generally spent on one project within one year to 18 months. Charities are immediate response and require money to fulfill their annual budget.

2. **Foundation** – to make a donation to a foundation is generally to address a very large current ongoing project that is long lasting. For instance, an addition to a hospital. Foundations generally address current on going needs. Your donation is made once, a receipt is issued, then the money usually goes into a savings account to collect interest. The money is held for a specific time and when a project is completed and ready to be paid, the money is paid out one time. The good piece is that interest earned can be used for operating expenses, or as the governing board deems appropriate to fit their mandate.

3. **Community Foundation** – to make a gift to a community foundation is a gift to the future, the longevity, and the sustainability of a community. While the focus is to build investments for the future to always generate interest money for granting, community foundations do support service organizations through

grants made annually to address the immediate needs of the community. Dual purpose of current and future.

100% of gifts that are made to community foundations are invested in an endowment fund to be held in perpetuity, forever. A receipt is issued for each gift received. Each year only the interest earned on the said endowment fund will be used to grant out to service organizations to answer the needs of the community. The initial contributions are never spent. Only the annual interest earned is used to grant to community and pay for administration fees and investment fees. The upside of investing with a community foundation is that your gift will be part of granting every year, year after year. Grants will be made for many projects year after year and not just for one project in one year as it is when donating directly to a charity or foundation.

Community foundations do not generally do the work to answer the needs of the community. Community foundations are created to support the work of the service organizations in your area through annual monetary grants that address current needs of the community.

Therefore, the choice is yours! If you feel you want to answer a current need, then please make that donation. If you feel you want to be part of an ongoing need, then please make that donation. But if you feel you want to support your community forever as part of your legacy planning to answer the needs that may or may not exist now, for people who haven't even been born or moved to your community yet, then please make that gift to the Morris Area Foundation. This will be a gift that keeps on giving through many investment interest grants to help keep your community strong long into the future.



ADMINISTRATION FUND

This new fund was set up by the MAF Board of Directors to assist in the sustainability of the MAF's future operations. This is a responsible and effective avenue for the MAF to support itself in any and all administration costs and expenses whether budgeted or incurred. All are welcome to contribute to this fund.

LEGACY ESTATE PLANNING

Plan now to create a legacy that reflects your life and help our community For Good. Forever. A legacy gift can support the cause you are passionate about. Choose your cause, how you want to help, and a legacy gift will fulfill your future wishes.

What is a legacy gift? A legacy gift is a future charitable gift through one or more of the following:

- Will
- Listed appreciated securities
- Life insurance
- Retirement assets (RRSP, RRIF)
- Charitable remainder trusts
- Residual interest

Legacy gifts to the Morris Area Foundation can be directed to an existing fund, or you can create your own endowment fund.

What is an endowment fund? An endowment fund is like an investment account for our community. Gifts are permanently invested and a portion of the income earned (the spending policy) is distributed every year to local registered charities as grants.

Why make a legacy gift to the Morris Area Foundation? There are a lot of great reasons. You can...

- Make an impact in your community.
- Honour your values while supporting others.
- Support a cause you care about.

Since endowment funds are permanent, you will help our community For Good. Forever.

How to make a legacy gift to the Morris Area Foundation. The most common legacy gift is a charitable gift through a Will (bequest).

We are here to help you make sure that your gift supports what you care about...because we care about it too!

We will document your instructions carefully to ensure that we use your gift as you intend. You or your lawyer may also wish to have us review any Will wording naming the Morris Area Foundation to ensure we fully understand your wishes and to confirm that we can administer your gift as you prefer. It is essential to remember to provide the lawyer drawing up your Will with the correct name and charitable registration of any organizations named in your Will. The Morris Area Foundation's charitable registration number is **88029 6413 RR0001**.

Tax Benefits of All Bequests. Charitable bequests provide for your favorite cause with the potential of greatly reducing taxes owing and helping preserve the value of your estate.

Join us for Creating your Legacy. Want to learn more about including a charitable gift in your Will or estate? We hope you can join us for more information at a Creating your Legacy session.

These presentations are a great introduction on how you can plan now to create a legacy that reflects your life and helps our community. Learn how easy it is to:

- Leave a bequest for a cause close to your heart
- Create a personal or family legacy
- Give as part of your estate plan (there are tax benefits!)

Contact the MAF office for the next presentation date.

* The above is provided for information only; the Morris Area Foundation encourages you to seek guidance from a professional lawyer.

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2022 INVESTMENT DONORS

All gifts small or large add up to a strong, vibrant, and caring community. Thank you to all donors for your partnership and investment in Morris and area.

FUNDS

Morris Area Foundation General Fund - supports various project applications submitted by registered charities wherein the MAF Board grants monies where possible to enable the good work to continue in the Town of Morris and surrounding area within the Rural Municipality of Morris.

Morris Area Health and Wellness Fund - supports initiatives of health and wellness benefiting the area served by the Morris Area Foundation.

Morris Rosenort School Youth in Philanthropy Fund – supports initiatives of the Youth in Philanthropy organizations within the Morris Rosenort school. This organization serves as an opportunity for youth to learn about local service organizations and take part in philanthropic work within the Municipality of Morris.

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- Access Credit Union Corporate
- Anderson, M
- Barker, J
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- Baxter, M
- Bell, E
- Bruce Gregory Law Office
- Buhler, M
- Buhr, E & C
- Buisson, G
- Clayton, A
- Coates, B & C
- Dale & Lynn Rempel Foundation
- Decima, Anne
- Dickson, J & A
- Dickson, W
- Driedger, E
- Edel, D
- Edel, E
- Edel, G
- Edel, M & E
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- Evenson, C
- Evenson, C & P
- Fitchett, M
- Fulford, R
- Fyfe, R
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- Grossman, E
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- Morris & Rosenort YIP
- Murray, J
- Murray, R
- Rempel Insurance
- Robert, L
- Rural Municipality of Morris
- Shewchuk, B
- Schiewe, E
- Sommer, L
- Stupnisky, B & S
- Stevenson, C & J
- Stevenson, D & B
- Stevenson, N & I
- Stevenson, K & S
- Thiessen, N
- Town of Morris
- United Way, Winnipeg
- Watt, B
- Wiens, L & L
- Welch, M A
- Vermette, R
- Anonymous – 31 Donors

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