



Foundation of Greater Montréal

Why carry out your philanthropic project with FGM?

April 2025



Foundation of Greater Montréal

A foundation whose mission is to serve the community

MOBILIZE

philanthropic
resources

CATALYZE

initiatives and
partnerships

PUBLICIZE

Information on
issues facing the
community



Some advantages of FGM

- A simplified, flexible and affordable approach.
- A range of integrated services.
- Personalized support for fund creators.
- In-depth knowledge of community needs.
- Competitive rates and returns.
- Expertise in public and private matching programs.

Some advantages of FGM

	Create a fund at FGM	Establish a private foundation
Startup	Drafting and signing of a simple agreement. No start-up costs.	Legal, tax and administrative procedures. Upfront costs of several thousand dollars.
Deadline	A few days.	Between six months and a year.
Recurring costs	Fees of 1.5% maximum (administration and management).	Variable costs for administration, fund management, day-to-day operations, etc.
Reporting to the CRA	Produced by FGM at no additional cost.	Produced by an external professional (\$) or a member of staff assigned to this task.
Grant allocation	FGM expertise across a wide range of sectors to maximize impact.	Expertise must be developed internally.
Succession	Instructions given in advance. Easy to involve family members.	Formation and maintenance of a board of directors which will be responsible for this.

A 25-year track record of growth and impact

\$483.5M

Assets under management

800

Philanthropic funds

\$17.4M

Grants distributed (2024)

16.1%

Annual rate of return (2024)

*as of December 31, 2024



Foundation of Greater Montréal

Serving the region's largest institutions

CCA

 Centraide
du Grand Montréal

 CQDE
CENTRE QUÉBÉCOIS DU
DROIT DE L'ENVIRONNEMENT

 CENTRE
SEGAL
PERFORMING ARTS
ARTS DE LA SCÈNE

 CIBPA
MONTREAL

 CONSEIL
DES ARTS
DE MONTRÉAL

LES
GRANDS
BALLETS
CANADIENS DE MONTRÉAL

 Les YMCA
du Québec

 MAC

 moisson
ALIMENTER LA VIE RIVESUD

 MUSÉE DES
BEAUX-ARTS
MONTRÉAL

 Musée Holocauste Montréal
Montreal Holocaust Museum

MUSÉE
McCORD
MUSEUM

OPÉRA
DE MONTRÉAL

 ORCHESTRE
Symphonique de Longueuil
ALEXANDRE DA COSTA



 OXFAM
Québec

 POINTE-À-CALLIÈRE

 Foundation of Greater Montréal

Why choose FGM?

A TURNKEY APPROACH

- **Speed:** no steps necessary with the tax authorities - your Fund is established without delay via a simple agreement with FGM.
- **Efficiency:** the Foundation of Greater Montreal takes care of the administration of your Fund, including issuing tax receipts, producing reports, etc.
- **Flexibility:** FGM accepts several types of assets, such as life insurance policies, stock market securities, bequests or various forms of investments.
- **Simplicity:** no board of directors to establish, you manage your Fund as you wish. If you wish, an advisory committee can be formed to support you or take over.
- **Impact:** the Foundation of Greater Montreal takes care of relations with charitable organizations and oversees the distribution of grants.

Why choose FGM?

RECOGNIZED EXPERTISE

- FGM is recognized for its experience in promoting and democratizing philanthropy for over 20 years now.
- She supports you to ensure that your philanthropic project reflects your values and priorities, while meeting the most important needs of our community.
- Its governance and financial management are supervised by the Financial Markets Authority (FMA) and ensured by an experienced and rigorous board of directors.
- It offers diligent and transparent reporting. All its reports are public and your Fund's statements are available online at all times.



Why choose FGM?

AN EFFICIENT AND AFFORDABLE STRUCTURE

- No fees charged for creating new funds.
- Total fees of 1.5% maximum, calculated on the market value and deducted monthly from the fund balance.
- These administration and management fees are among the lowest of community foundations in Canada.
- Returns equal to or greater than those of private institutions.

Different types of funds to achieve your goals

Dotation funds

- The capital is invested and generates an annual income which supports the granting capacity of your Fund.
- Grants can be awarded to any organization of your choice (registered or trust-linked charities).
- You choose the Fund term that best suits your vision and needs; from 10 years to life.
- Minimum investment of \$100,000.

Philanthropic fund

- Offers the same benefits as the Endowment Fund, except that it allows capital to be used for grant distribution.
- The term of the Fund can vary from one year to perpetuity, depending on the rate at which the capital is used.

Join our philanthropic community

- Hundreds of funds created by individuals and families who have chosen FGM as their philanthropic partner.
- More than 300 funds created by nonprofit organizations, which benefit from the administrative support we provide and the matching programs we facilitate.
- Endowment funds created by large philanthropic foundations at the heart of Montreal's charitable sector.
- Partnerships with companies of all sizes that use FGM to manage their philanthropic activities.
- Strong ties with cultural communities, which reflect the dynamism and diversity of Montreal and which work with the FGM to achieve our common objectives.
- Dozens of initiatives led by FGM, which raise awareness and call for action to meet the urgent needs of our community, from climate change to food security.

An investment committee made up of various financial professionals

Valérie Cecchini, M.Sc., CFA, CPA
Chair
Managing Partner
Borealis Global Asset Management

Gilles Chouinard
Vice-President of Investments
Association de bienfaisance et de retraite des
policiers et policières de la Ville de Montréal

Kathy Fazel, CFA, IAS.A
Senior Investment Counsellor
RBC PH&N Investment Counsel Inc.

Jean-François Marcil, CFA
Lecturer
Université de Sherbrooke

Caroline Montminy, CFA
Vice-President and Investment Counsellor
Burgundy Asset Management

Kenny Tang, CFA, CPA, FRM
Chief Compliance Officer and ESG Leader
Trans-Canada Capital Inc.

Jason Taylor, CFA, CAIA, MBA
Expert in sustainable investing and environmental
commodities

David Turcotte, M.Sc, CAIA, FRM
Senior Director, Funds - Private Markets
Caisse de dépôt et placement du Québec

Natacha Zénié, CFA
Chief Executive Officer and Chief Investment Officer
Eclipx Family Office

A board of directors made up of individuals from all sectors

Karen Macdonald
Chair

News Director and Station Manager
Global TV Montréal

Frédéric Lavoie, CPA
Vice-chair

Partner
PwC

M^e Eric Lapierre, LL. B.
Secretary

Assistant Vice-President and Assistant
Chief Counsel,
Manulife

Toni Dilli, CPA, CFA
Treasurer

Partner, Audit
KPMG

M^e Nadir André, LL. B.
Partner
BLG

Valérie Cecchini, M.Sc., CFA, CPA
Managing Partner
Borealis Global Asset Management

Corinne Charette
Senior Fellow, John Molson School of
Business
Concordia University

Mariama Dupuis
Chief of Staff, Chairman & CEO
Sagard

Kathy Fazel, CFA, ICD.D
Senior Investment Counsellor
RBC PH&N Investment Counsel Inc.

Suzanne Gouin
Corporate Director

Pascal Grenier
CEO
Campus de la transition écologique

**Sophie Labrecque, MBA, Ch. O.M., ASC,
C. Dir.**
Founding President and CEO
Agence philanthropique MAGNET

Angelina Mehta
General Manager of Joint Ventures
Rio Tinto Aluminium

Jane Rabinowicz
Chief Program Officer
McConnell Foundation

Nadine Raymond
CEO
Montreal YWCA

Kenny Tang, CFA, CPA, FRM
Chief Compliance Officer and ESG Leader
Trans-Canada Capital Inc

Jason Taylor, CFA, CAIA, MBA
Expert in sustainable investing and
environmental commodities

Me Diane Tsonos, LL. B., TEP
Tax Partner and Lawyer
Richter LLP



Foundation of Greater Montréal

For all questions :

Philanthropic Development Team

philanthropie@fgmtl.org

(514) 866-0808 ext. 123



Foundation of Greater Montréal