

# Echelon Foundation

Echelon Wealth Partners is pleased to announce the creation of the Echelon Foundation.

At Echelon, we have always believed in making strong commitments to our communities and in doing what we can to secure better futures for others. The Echelon Foundation gives us the ability to provide support to those in need through a collectively focused effort.



## MEET THE ECHELON FOUNDATION

Over the years, one of our most resounding points of internal feedback has been advocacy for a corporate philanthropic platform to embrace social responsibility opportunities. In the spring of 2018, management responded by creating the Echelon Foundation.

We are a company of individuals who care deeply, for our colleagues, their families, and people within our borders and those beyond. In recognition of this benevolent spirit, the Echelon Foundation was established to be a trusted channel for contributions whose funds will be appropriately governed and allocated.



## WHAT IS THE MANDATE OF THE FOUNDATION?

The mandate of the Echelon Foundation is to collect funds and allocate those funds to appropriate and vetted charities in accordance with the rules and regulations set out by the Canada Revenue Agency (CRA). Echelon will be contributing to the fund, with a cap, in a matching format, nationally, branch wide and individually. Our cap for 2019 is \$60,000 and we look forward to you joining us in reaching this goal.



## WHO CAN PARTICIPATE?

The Echelon Foundation was created for the employees of Echelon. If you are interested in contributing to the foundation on a regular basis, you may inform [Doug Glover](#), as an automatic withdrawal can be made from your pay cheque. Alternatively, you can contribute at your convenience by writing a cheque to the Echelon Foundation or by end of year through our MyEchelon portal. There will be occasions where internal fundraising efforts are directed to the Foundation, such as they were recently at the Las Vegas Advisor Conference. Echelon was allocated a VIP Suite with our room block allotment, and we placed it in auction with the proceeds going to the Foundation.



### WANT TO JOIN THE FOUNDATION COMMITTEE?

We are looking for volunteers to spearhead the Foundation's activity and events on a national and local level. The Committee will be comprised of 8 people, with representation in our major markets. The Committee will inform and advise the Board of proposed recommendations of charitable support. Interested in joining the Committee? Please contact [Crissa Pakkidis and John Margaris](#).



### WHEN CAN I CONTRIBUTE?

Whenever you would like. The Echelon Foundation is fully functional and ready to receive contributions now.



### IS THE FOUNDATION A CHARITY?

Yes. The Echelon Foundation is a registered Canadian charity that functions like a corporation with specific rules and regulations governed by the CRA. Tax receipts will be issued for all contributions.



### WHO GOVERNS THE FOUNDATION?

The Echelon Foundation is governed by a board of directors. The members of the foundation board are: David Cusson, CEO, Echelon Wealth Partners; John Hughes, Partner, MNP, and Andre Poles, Partner, Gowling WLG. The Echelon Foundation Board will determine the recipient of the funds on an annual basis depending on the needs of various organizations within our regions and recommendations received by the Committee.



### IS THE FOUNDATION FOR OUR CLIENTS?

The Echelon Foundation was created for our own corporate community initiatives. An alternative foundation, named the Echelon Donor Advised Foundation (EDAF) will be a vehicle for our clients to make their own charitable contributions.



### WHAT THE FOUNDATION WILL NOT SUPPORT

Every year we are approached by Echelon employees to assist in sponsorship and participation to personal charitable events such as hospital fundraisers, golf tournaments and other events in support of various causes. The Foundation's fundraising is not available to support these. As in the past, we will continue to encourage you to support your community events personally or apply your BDA should it be considered a marketing expense.



#### QUESTIONS?

If you have any questions regarding the function of the Foundation, how to join the Committee or recommendations of charitable organizations in your community, please contact [Crissa Pakkidis](#) and [John Margaritis](#).