



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.

### **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; David Doritty, Vice-Chair Echelon Partners, and Andre Poles, Partner, Dickinson Wright LLP. 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.

### **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 at [cpakkidis@echelonpartners.com](mailto:cpakkidis@echelonpartners.com) and John Margaris at [jmargaris@echelonpartners.com](mailto:jmargaris@echelonpartners.com).