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*Creating a personalized fund  
is making a perpetual gift*

Ensure the **continuity**  
of your gift to help  
Portage **overcome**  
substance abuse



**PLANNED GIVING PROGRAM  
CREATED FOR PORTAGE DONORS**

Our  
**new**  
program

Portage now has a new program to respond to the requests of its donors who wish to do more for Portage. This new program complements your annual contributions. An increasing number of donors would like to ensure the continuity of their generosity in order to help Portage overcome substance abuse by creating a personalized, permanent fund. You can create a fund in your name or in the name of a loved one, during your lifetime or upon your death by contributing to the Portage Fund.

*"Mr. André Chagnon is the reason that I initially decided to support Portage. For the last ten years, the devotion and mobilization of the volunteers and employees have been a source of motivation for me and inspired me to support this cause."*

- Carmand Normand  
Chairman of the Board  
and Chief Executive  
Addenda Capital inc.

CHARITABLE ORGANIZATION REGISTERED NUMBER: 12915-1072-RR0001

[www.portage.ca](http://www.portage.ca)

# The Portage fund

The Portage fund is an endowment fund that allows you to ensure the continuity of your support of the Portage programs or services of your choice. It is a fund that can bear your name or the name of a loved one. This fund's capital is judiciously invested and will contribute to make a difference in the lives of those suffering from substance abuse.

The capital is permanently invested and only the fund's income (interest, dividends and capital gains) is distributed to Portage. Notwithstanding, to ensure the continuity of your endowment fund, a minimum part of the income, in accordance with legislative agreements, and under the vigilant management of the Foundation of Greater Montreal, is reinvested with the capital.

*"I truly believe in Portage's mission, I feel it is my duty to contribute annually. I have long understood that the cause, which is dear to my heart, will not die with me. This desire to ensure the continuity on my support guided me to the planned gift through a life insurance policy. My planned gift: Such an impact for so little cost."*

**Yvan Boisvert**  
President  
REGAR Gestion Privée



*We will invest your gift judiciously and protect it in perpetuity, with the greatest respect for your choices*

## Creating a personalized fund

Guided by professional advisers, the donor, taking into account his financial, fiscal and estate planning, expresses his philanthropic objectives and sets up a structured process for his donations.

## The process

The donor can contribute to the growth of an existing fund of his choice or create, with a minimum sum of \$10,000, a personalized fund. There are no waiting periods, legal or administrative start-up fees.

There are several ways to contribute to an endowment fund, such as:

- An immediate gift: in cash or in the form of publicly traded shares.
- A differed gift: through a testamentary bequest or a gift of a life insurance policy.

## A customized partnership for Portage

Portage designed a customized partnership with the Foundation of Greater Montreal. By entrusting the Foundation with the management of its funds, Portage profits from its experience and knowledge of the philanthropic sector. This allows Portage to benefit from the Foundation of Greater Montreal's expertise in the field of business and large donors.

The Foundation of Greater Montreal is a member of the Community Foundations of Canada (CFC) network. The CFC network brings together more than 170 community foundations, with collective assets that total 2.4 billion dollars, and includes 89% of the Canadian population.

With this partnership, Portage benefits from significant advantages such as reduced administrative costs, a portfolio managed by well-known professionals and competitive yields.

## Advantages for the donor

The donor chooses a personalized gift structure meeting his philanthropic objectives by supporting the cause of his choice while also being able to create a fund in his name or the name of a loved one and leaving a perpetual memory.

The donor profits from all the fiscal advantages prescribed by the Income Tax Act. For each contribution made to his fund, the donor will receive a receipt for tax purposes.

## Support Portage

Since its foundation, Portage has contributed to the well-being of thousands of people facing drug and alcohol dependency problems: adolescents, adults, mothers with young children, pregnant women and mentally ill chemical abusers.

Portage's objective is to support them on their path to sobriety and, above all, to give them this taste of life that will instil self-confidence. After treatment at Portage, they become active and productive citizens in their community.

Contributing to the growth of current Portage funds or creating a personalized fund means offering Portage the stability to continue its mission in the long term for all these people who wish to regain control of their life. It also allows Portage to recognize the generosity of donors in perpetuity.

*To give to Portage is to overcome substance abuse*



*Your generosity will be everlasting at Portage*