



Canada's source for  
HIV and hepatitis C  
information

La source canadienne  
de renseignements sur  
le VIH et l'hépatite C

## Individual Donations

CATIE accepts donations by cheque, Mastercard, Visa and American Express. If you prefer to make your donation by phone or by mail, please [contact us](#) for assistance. All donations may be receipted only in accordance with Revenue Canada guidelines (see [Donations policy/Tax receipts](#)).



[Make a donation using our secure, e-commerce form.](#)

## Memorial Gifts

CATIE can be designated as the recipient of memorial gifts when making funeral arrangements. Upon the death of a loved one, individuals can request that donations be made to CATIE. Special memorial cards are available in most funeral homes for this purpose.

## Planned Giving

### What is planned giving?

Planned giving is an investment in the future of the charity of your choice. You arrange now for a gift that, generally, the charity will receive at a later time.

One advantage to planned giving is that it can turn small contributions made today into much larger gifts in the future. Planned gifts also involve assets, not income, so they need not cost you anything now. In fact, they can save you money.

With planned giving, you can design your gift in such a way that you will obtain the best possible tax and financial benefits. Planned gifts include deferred gifts, such as bequests and life insurance policies, and current gifts, which are designed to maximize tax credits and minimize taxes on capital gains.

Some individuals shy away from discussing planned gifts: they feel uncomfortable contemplating arrangements associated with death. But such gifts are ones that you plan when you're alive. They also give you control over your personal and financial affairs both during your lifetime and after. And they allow you to leave a legacy.

### What are my options?

#### Bequests

The most common form of planned giving is a bequest. Both bequests and life insurance policies are exempt from estate tax, meaning they can lead to an overall tax reduction for your estate. You can include a bequest to CATIE in your will simply by adding a line such as "I bequeath to the Canadian AIDS Treatment Information Exchange the sum of (designated amount)." Bequests are easily arranged through legal or financial advisors.

You can also call CATIE to learn specific details about how to include the charity in your estate planning. If you want to restrict the use of the bequest or establish an endowment, we can discuss the different possibilities as well. Please remember that you should seek professional advice to make sure that your planned gift fits your financial circumstances.

#### Life Insurance Policies

You may name CATIE as the owner of a new or existing insurance policy. Doing so entitles you to a tax receipt for

both the cash value of the policy and any premiums paid during your lifetime or when your estate is settled. As an alternative, CATIE can be the beneficiary but not the owner of the policy. Generally in this case, however, no tax receipt will be issued, since this type of gift is considered revocable. The exception to this rule applies if you arrange for the proceeds to be paid to the estate and then make a bequest to CATIE for an equivalent amount. For more information, talk to your insurance agent.

## **Donations policy**

### **1) Stewardship of Donations**

All donors are entitled to receive a charitable donation tax receipt in accordance with current taxation law and the Canada Revenue Agency guidelines and;

1. Donors and prospective donors must not be subjected to coercion or undue pressure.
2. Donors are to be encouraged to seek independent advice concerning any proposed donation that might significantly affect the donor's financial position, taxable income, or relationship with other family members.
3. Any request by a donor to be excluded from lists that CATIE uses or shares with other organizations is to be honoured.
4. All reasonable efforts are to be taken to honour any request from a donor or prospective donor not to be contacted in future fund raising campaigns.
5. Any information from or about donors that is obtained by, or on behalf of CATIE is to be kept confidential to the extent allowed by law.
6. Donors have the right to remain anonymous.
7. All fund raising appeals by or on behalf of CATIE are to disclose CATIE's legal name, its status as a registered charity, and the purpose for which funds are requested.
8. All members of the public, including donors and prospective donors, are entitled to the following, on request and at no charge other than the cost of reproduction and distribution:
  - a. CATIE's most recent annual report and/or audited financial statements;
  - b. CATIE's most recent Registered Charity Information Return (T3010A) as submitted to Canada Revenue Agency; and
  - c. A list of the names of the members of CATIE's board of directors.
9. Donors and prospective donors are entitled to know, upon request, whether the individual asking for funds is a volunteer or a paid fund raiser.
10. Donors are to receive a written or verbal acknowledgment of their donation(s) within a reasonable period of time.

### **2) Lists**

These lists include:

1. CATIE maintains several mailing lists which are used to disseminate a wide variety of information to a broad constituency. It is understood that names and addresses are given to CATIE for a number of different reasons and that this information is bound by CATIE's confidentiality and privacy policies.
  - a. Callers ordering information over our 1-800 toll free line
  - b. Information requests from the Web
  - c. Workshop participants
  - d. Subscribers
  - e. Donor
  - f. Members
2. All complaints regarding solicitation are to be forwarded to, and dealt with, by the appropriate staff.
3. Donors/prospective donors or subscribers who ask how their names got on a list are to be given the source of that list.
4. CATIE's lists are for internal purposes only and CATIE will not share, trade, rent or lend any list.

### **3) Accepting Benefits from Donors or Sponsors**

From time to time CATIE Board or Staff members will be invited to attend events where the cost is paid by a donor or sponsor. In such cases, transparency is crucial and approval will be sought.

- In the case of a Staff member, from the Executive Director,
- In the case of a Board member, from the Chair of the Board,
- If broader approval is deemed necessary, the decision will be referred to the Board Executive Committee or, if needed, the Board in its whole.

#### **4) Tax Receipts**

All donations may be receipted only in accordance with Revenue Canada guidelines and;

- Tax receipts are not issued for the donation of services. For donation of services, cheques must be exchanged in order to issue a tax receipt.
- Final interpretation of Revenue Canada guidelines for charitable tax receipts rests with CATIE's auditors.
- The signing officers of the organization shall be the signing officer(s) for the purposes of tax receipts.

## Produced By:



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## Disclaimer

Decisions about particular medical treatments should always be made in consultation with a qualified medical practitioner knowledgeable about HIV- and hepatitis C-related illness and the treatments in question.

CATIE provides information resources to help people living with HIV and/or hepatitis C who wish to manage their own health care in partnership with their care providers. Information accessed through or published or provided by CATIE, however, is not to be considered medical advice. We do not recommend or advocate particular treatments and we urge users to consult as broad a range of sources as possible. We strongly urge users to consult with a qualified medical practitioner prior to undertaking any decision, use or action of a medical nature.

CATIE endeavours to provide the most up-to-date and accurate information at the time of publication. However, information changes and users are encouraged to ensure they have the most current information. Users relying solely on this information do so entirely at their own risk. Neither CATIE nor any of its partners or funders, nor any of their employees, directors, officers or volunteers may be held liable for damages of any kind that may result from the use or misuse of any such information. Any opinions expressed herein or in any article or publication accessed or published or provided by CATIE may not reflect the policies or opinions of CATIE or any partners or funders.

Information on safer drug use is presented as a public health service to help people make healthier choices to reduce the spread of HIV, viral hepatitis and other infections. It is not intended to encourage or promote the use or possession of illegal drugs.

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<http://www.catie.ca/en/about/partnerships-and-donations/donations>