



## **Donor Expectations**

If you are a planned gift donor or prospective donor, you can expect us to:

- Place your charitable giving goals at the centre of our activities with you and on your behalf.
- Give you information that is as understandable, accurate and complete as possible.
- Treat you with dignity and respect.
- Ask you for personal information only as necessary to our work, and adhere to our privacy policy <https://elfec.ca/our-privacy-policy> .
- Keep your personal information confidential, unless you give us express permission to release it to another party or make it public.

## **Investment Partner Expectations**

If you are an investment partner or fund-holder, you can expect us to:

- Adhere to the agreement we signed with you concerning the operation of your fund.
- Follow the investment objectives and principles stated in our Investment Policy, as amended from time to time.
- Inform you if there are significant changes to our investment policy or practice.
- Send you an informative fund statement as soon as possible following the end of each calendar quarter.
- Make full payment to you, or the party(ies) specified in your fund agreement, of the annual investment income earned by your fund, less administration fees, within the first quarter following our year end of December 31. Alternatively, we will add all or part of the income to the capital of your fund if you have given us written instructions to do so.
- Answer your questions as promptly, clearly, accurately and completely as possible.
- Publish our Annual Report and Audited Financial Statements on our website.

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*If we do not deliver on any of these commitments, you can send your complaint to the vice-chair of our Board of Directors, Cindy Bondi, at [cindy.bondi@gmail.com](mailto:cindy.bondi@gmail.com)*