

Today's most trusted financial advisors talk to their clients about how charitable giving can best fit into a comprehensive financial plan.

### Why You Should Discuss Philanthropy With Your Clients:

- 1 It expands the menu of services available to your clients and broadens your area of expertise and contribution as a professional advisor.
- 2 By incorporating a new level of expertise into your practice there is an increase in potential for new referrals, thus opening the door to many new clients.
- 3 It creates the opportunity to enrich client relationships.
- 4 Research shows that many of your clients are searching for a way to give back to society, to memorialize a loved one, or simply to "do good."
- 5 It's good for society, it's good for your clients, it's good for your business, and so it's also good for you.

*Recent statistics report that over 5.7 million Canadians contributed \$6.9 billion to charitable organizations last year... were some of them your clients?*

Clients are increasingly interested in understanding their charitable options and expect their advisors to help them create innovative, comprehensive financial plans that take care of their families and friends, avoid taxes and accomplish their philanthropic goals. Statistics indicate that when considering their overall goals, more people are integrating charitable giving into their planning to realize personal and financial benefits.

## SICKKIDS CHARITABLE GIVING FUND

### What is a Donor Advised Fund?

*Many financial advisors are now seeking tools to help create the best strategies for philanthropic giving that go beyond effective tax planning. One of these tools is a donor advised fund.*

A donor advised fund is a simple, convenient and tax-effective alternative to creating a private foundation. *It is a straightforward and convenient solution that blends immediate tax benefits with the ability to support registered Canadian charities today, tomorrow and for generations to come.*

*In just THREE EASY STEPS your client can establish a lasting legacy of giving:*

### ONE

Your CLIENT MAKES A GIFT of at least \$50,000 payable over five years to establish A Donor Advised Fund at SickKids (e.g. "The Williams Family Fund"). Your client receives a charitable tax receipt for the value of the donation.

### TWO

SICKKIDS INVESTS THE FUND, and provides an annual statement to your client of earned income that is available to grant to charities.

### THREE

Annually, your CLIENT MAKES GRANT RECOMMENDATIONS to registered Canadian charities, including a portion to SickKids Foundation. SickKids distributes the grants. Your client may be anonymous if they choose.

*Your client may be a good candidate for a donor advised fund if he/she is:*

- Interested in supporting multiple charities;
- Frustrated at tax time with the burden of organizing multiple tax receipts;
- Interested in competitive investment returns and a solid investment track record;
- A prudent investor who sees the value in centralizing their philanthropic dollars by investing alongside an established charity's endowment fund;
- Interested in creating a lasting charitable legacy;
- Interested in involvement, but does not want administrative and financial burdens associated with a private foundation; and/or
- Interested in moving assets out their portfolio during their lifetime as part of an overall financial and estate plan.



DONOR  
ADVISED  
FUNDS

MULTIPLE CHARITIES  
COMPETITIVE INVESTMENT RETURNS  
CENTRALIZED PHILANTHROPIC DOLLARS  
LASTING CHARITABLE LEGACY  
ADMINISTRATIVE EASE

*What's in it for you?*

SickKids has a long and successful track record of investment management and will extend that success to managing your client's philanthropic dollar. Although you will not receive financial benefits by introducing this option to your clients, as a high-calibre professional, you can strengthen your client relationships by presenting an attractive vehicle through which clients can accomplish their philanthropic goals. At SickKids, your client won't be treated as an "account," but as a welcome member of the SickKids family.

*In light of the recent elimination of capital gains tax on the donation of appreciated securities, there has never been a better time for your client to consider creating their legacy. For some of your clients, the actual cost of their donation will be less than if they made a cash gift.*

CONTACT US!

Our staff at SickKids Charitable Giving Fund is happy to provide you with more information about donor advised funds and maximizing the tax advantages through such a fund.

Together, we can assist you in providing a comprehensive philanthropic plan for your clients. For more information please contact Angela Murphy at 416 813 8260 or at [angela.murphy@sickkidsfoundation.com](mailto:angela.murphy@sickkidsfoundation.com).