SASKATOON COMMUNITY FOUNDATION

For more information on the array of options Saskatoon Community Foundation can offer your clients, visit:

A: 101 – 308 Fourth Avenue North
Saskatoon, SK S7K 2L7
T: 306.665.9880
E: development@saskatooncommunityfoundation.ca

saskatooncommunityfoundation.ca/give

COMMUNITY FOUNDATIONS OF CANADA
all for community.

We're a proud member of Community Foundations of Canada.

Charitable #119140911 RR0001

SASKATOON COMMUNITY FOUNDATION

HELP YOUR CLIENTS MAKE A DIFFERENCE.

Start a conversation about charitable giving.

THE MEANING OF LIFE IS TO GIVE MEANING TO OTHERS.

We all have the ability to inspire hope in others, contribute to our community, and create a lasting legacy. Saskatoon Community Foundation is happy to provide its philanthropic expertise and experience to help you guide your clients in leaving a legacy that is meaningful to them and their families.

HELPING YOU HELP YOUR CLIENTS REACH THEIR PHILANTHROPIC GOALS.

Professionals working in estate planning hold a special trust with their clients. From a straightforward will update to complex tax planning for business succession, your clients look to you for guidance when it comes to taking care of the most important areas of their lives—their families, their businesses, and their legacies. Saskatoon Community Foundation is proud of the work we do with professional advisors—including lawyers, accountants, wealth managers and investment advisors, trust consultants, insurance brokers, and life underwriters—to strengthen and deepen your relationships with your clients through important conversations about charitable giving.

Saskatoon Community Foundation can simplify giving options, offer a variety of avenues to achieve your clients' philanthropic goals, and provide expert advice on how best to support the emerging needs of our changing community.

WHY ASK ABOUT CHARITABLE GIVING?

Conversations about charitable giving add tremendous value for your clients and your practice. With so much to consider when making an estate plan, your clients may not think to include giving. They might be unaware of the tax advantages available to them and their estates. By asking about giving, you also demonstrate you are engaged in the community and want to make a difference.

> **"Every Canadian has three possible beneficiaries to their estate: family, charity, and the tax department. We can only pick two. Most people prefer to minimize what the Canada Revenue Agency (CRA) gets."**
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> **– Mark Halpern, CFP, TEP, CEO of WEALTHinsurance.com Globe & Mail, November 6, 2017**

WHY SASKATOON COMMUNITY FOUNDATION?

Saskatoon Community Foundation has been a trusted partner in local charitable giving since 1970. It was created to hold endowments in perpetuity, which are invested to earn returns that are then granted to charitable organizations. Saskatoon Community Foundation manages over $60M in assets and has a range of giving options that can be tailored to your clients' particular goals. Whether they want to give for long-term benefit or immediate impact, give now or give through their estate, Saskatoon Community Foundation's expertise in financial management and strategic philanthropic investment allows your clients to focus on what means most to them—making a difference for the charities and causes they care about.

HOW CAN GIVING THROUGH SASKATOON COMMUNITY FOUNDATION BENEFIT MY CLIENTS?

Saskatoon Community Foundation makes giving easy. There are just three decisions to make:

WHAT TO GIVE

What type of gift makes the most sense for your client?

Saskatoon Community Foundation works with you to help clients make a difference, while also maximizing their tax benefit.

WHEN TO GIVE

Now or as a bequest? For immediate impact or endowed in perpetuity?

Your client can create a tailored giving plan that meets their needs.

WHERE TO GIVE

Locally or around the world? To specific charities, in support of a general field of interest, or to Saskatoon Community Foundation's local granting program?

Your clients will have peace of mind knowing that the causes they care about are supported and that the details are being managed with care.

HOW CAN SASKATOON COMMUNITY FOUNDATION HELP ME HELP MY CLIENTS?

As a registered charitable foundation, we are a cost-effective and efficient option for industry professionals and donors to obtain expert advice on the charitable sector and philanthropic opportunities. To connect your clients' philanthropy to the causes that mean the most to them, Saskatoon Community Foundation offers insight on charitable gift planning and community priorities. We provide client-focused, cause-neutral, donor-centred expertise that works in tandem with your advice on estate management.

TYPES OF GIFTS:

CASH OR PROPERTY

A gift of cash or property gives your client the satisfaction of seeing their gift at work today and provides immediate tax benefits.

BEQUESTS OR GIFTS BY WILL

A charitable bequest added to a will is an easy way to benefit the community and create a personal legacy for your client. The charitable gift is eligible for a tax credit for estate tax purposes.

GIFTS OF LIFE INSURANCE

Donating life insurance is a simple way to make a significant contribution to the community and establish your client's legacy of giving. It can also create tax benefits that they can enjoy during their lifetime or put towards taxes on their estate.

APPRECIATED SECURITIES (PUBLICLY LISTED)

Gifting stock or securities through Saskatoon Community Foundation allows the donor to receive a tax receipt for the full amount, essentially eliminating the capital gains taxes associated with the stock. This can reduce the real cost of their charitable giving or increase the amount of their gifts without increasing cost.