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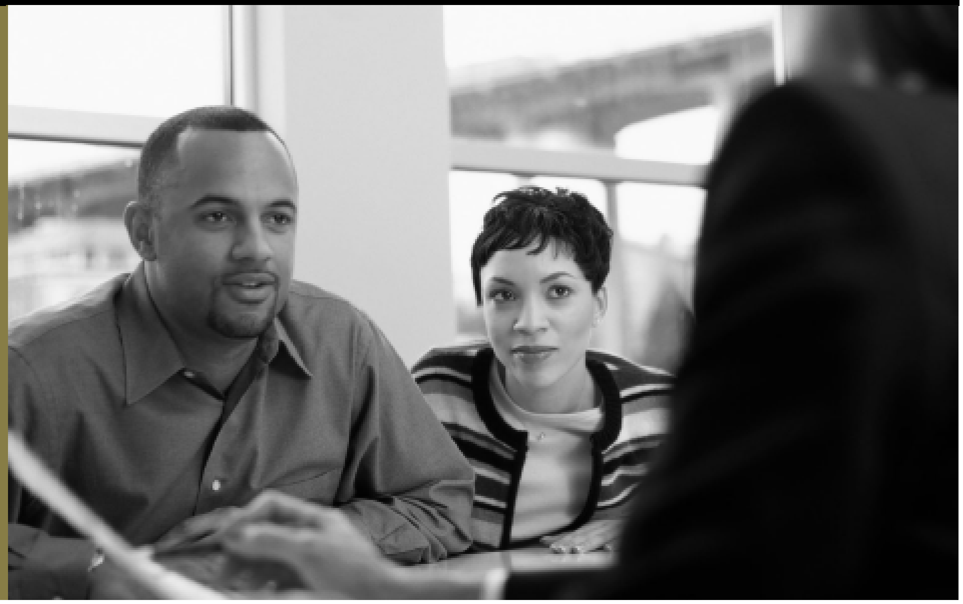
ADVISOR TOOLS

Giving advice on charitable giving

Professional advisors and The Calgary Foundation - **working together** for clients and community.



Professional advisors find themselves *at the centre of two dramatic forces in our country today: the enormous increase in personal wealth and the renewed concern for community.*

The number of Canadian households with discretionary assets of $500,000 or more is on the rise. In 2004, high-net worth individuals held more than $910 billion in assets. By 2012 that number is expected to approach $2 trillion.

At the same time, people from all economic backgrounds are giving back to their communities in record numbers. New gifts to Canadian community foundations rose by 17% in 2005 to reach a new record of $245 million. This marked the second consecutive year of record growth for community foundations, with $210 million in new gifts in 2004.

These trends are affecting professional advisor practices in two significant ways. First, advisors are incorporating charitable giving as an integral component in their financial and estate planning activities — including the question “do you have charitable giving interests?” is standard planning practice for many advisors today. Charitable giving advice adds value to an advisor’s services and is welcomed by clients who expect an integrated approach to their wealth management. Second, advisors are incorporating The Calgary Foundation as a trusted resource in delivering charitable giving knowledge and products to their clients.

(CONTINUED ON REVERSE)

THE CALGARY FOUNDATION
FOR CALGARY FOREVER

Here are ways that we can help

The Calgary Foundation can support you and your clients at every step in the charitable giving process. We can help you:

- Identify your clients’ charitable giving interests and motivations
- Match personal charitable interests with tax planning needs
- Create and implement charitable plans that are integrated into major business, personal and financial decisions
- Facilitate complex forms of giving such as stock transfers
- Provide information on community needs — and on the local agencies and programs that make a difference in the areas your clients care about most
- Deliver grantmaking expertise and a range of administrative services related to charitable giving

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Think of The Calgary Foundation as your personal planned giving centre

Community foundations have earned the trust of thousands of professional advisors across Canada. We work with advisors to enhance the service clients seek from you and your firm — always respecting and working within the relationship you have developed and lead with your clients.

The Calgary Foundation can provide a single point of contact for all of an advisor's charitable planning needs: we're a convenient, professional resource that helps you do more for your clients.

Our motivation is simple:

The Calgary Foundation is a local foundations created to help individuals and groups make an ongoing difference in their community. Our business is community philanthropy.

Everyone wins when we work together. Advisors forge deeper client relationships. Clients benefit from tax advantages and our communities are better supported – all through effective charitable giving.

The Calgary Foundation is a resource for advisors. Lawyers, chartered accountants, financial planners, brokers, insurance agents, and other professional advisors are turning to community foundations to help enrich the charitable giving strategies of their clients. Here's why:

"**The Calgary Foundation is a resource that enables people to be charitable in a very personal way.**"

ESTATE PLANNER

- The Calgary Foundation is a *neutral expert* with technical information on a range of planned giving options — from executing gifts of real estate, stock, or personal property to establishing Donor Advised Funds. The Calgary Foundation helps advisors provide their clients with the best charitable giving strategies based on each client's unique financial situation, tax status, and giving goals.

- The Calgary Foundation has *in-depth information* on local needs and non-profit organizations. When clients ask, "how can I make sure my charitable gifts will make a difference?," many advisors turn to community foundations for information on the programs and organizations that are working effectively in the areas of interest to their clients. The Calgary Foundation is in touch with local organizations addressing the broad spectrum of community needs — ranging from the environment, arts, education, and social services to special programs for youth, families, and seniors.

- The Calgary Foundation serves as the *vehicle for giving* many advisors seek for their clients. For example, community foundations can establish Donor Advised Funds — a very popular mechanism through which a client can make a charitable gift and stay personally involved in suggesting uses for that gift over time. The Calgary Foundation is frequently named in bequests as stewards for assets that a client wishes to direct to specific areas of community need in perpetuity. Giving through The Calgary Foundation also provides a client with the resources to evaluate potential grant recipients, as well as the ability to give to multiple charities with a single gift.

There's so much more we'd like you to know. *Your community foundation can help you help your clients achieve their charitable giving goals. We welcome the opportunity to work with you.*