

Build stronger relationships with your clients by helping them give easily and tax-effectively.



Have you spoken to your clients about their charitable giving?

Stand out from the crowd by making it possible for your clients to reach their philanthropic goals.

- 90% of high net worth clients donate to charity.*
- The majority of wealth advisors say philanthropy can deepen relationships with existing clients and help them meet new prospects.*

*Source: The 2018 U.S. Trust Study of High Net-Worth Philanthropy

Charitable Impact is a public foundation that operates as Canada's most accessible donor-advised fund (DAF).

We provide a platform for donors of all kinds to manage their charitable giving in one place—saving you *and* your clients time.

Working with Charitable Impact on behalf of your clients is:

Easy

Continue to administer client securities and manage their investments, while using your own account system and charging your own fees.

Convenient

Our app and online platform make it simple for your clients to give to charities of their choice. Our focus is on empowering donors and our team is available for support by phone, email, or chat.

Strategic

Your clients can give how, when, and where they want. At their convenience, we provide philanthropic advisory services to guide them.

Optimizing

Many of your clients are already giving. By facilitating the donation of appreciated publicly traded securities—a more tax-effective way to give than cash—you save your clients money.

Accessible

Everyone has something to give. You can deposit as little as \$5 to an Impact Account. The largest donation we processed was well over \$50 million.



Charitable Impact has processed **+\$1 billion** in charitable donations from **+167,000** generous Canadians.

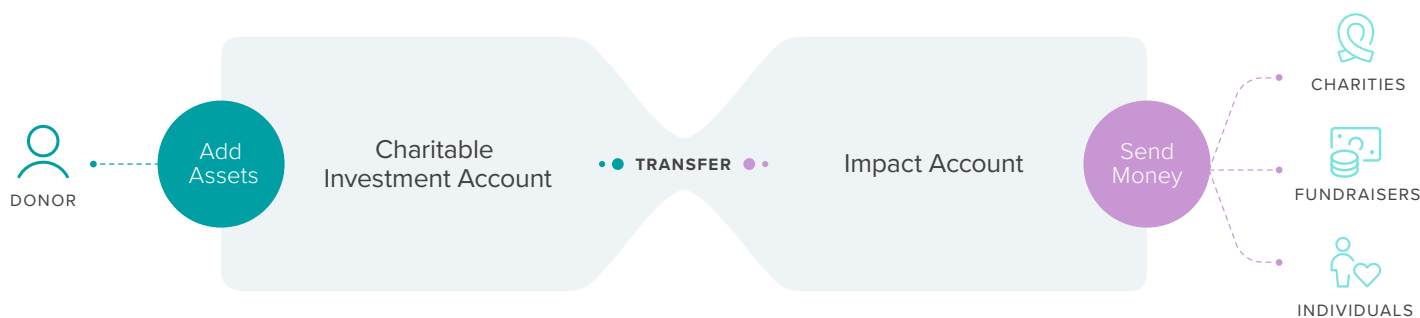
Our purpose is to help create the change you want to see in the world and our mission is to nurture the generosity in each of us. Why does this matter to you? Because wanting to help others comes naturally, but knowing how to make a difference through charitable giving doesn't. With our support, you can bring your clients the joy of giving, in a way that is smart and strategic.

Streamline your clients' giving with our personalized solutions.

Your clients receive the immediate tax benefits of donating, while also benefiting from time and space to decide where to give. Donors can give to any of the +86,000 registered charities across Canada. **By donating appreciated publicly traded securities, your clients benefit from the capital gains exclusion**—optimizing the tax-effectiveness of their gift.

Through a Charitable Investment Account, we provide the opportunity to invest and grow donated assets. You keep AUM and manage the investment strategy, even after assets have been donated. You don't have to worry about other details. That's because, through our **Impact Account**, your clients can give to any charity of their choice, track their giving decisions, and benefit from platform features (like robust support from our team).

How It Works



* Financial advisors use their own accounts to facilitate donations of publicly traded securities and manage ongoing investments.

We provide personalized solutions, dedicated support, and first-rate expertise. Charitable Impact processes donations of:

- Cash
- Publicly traded securities
- Private company and preferred shares
- Assets from private and community foundations
- Life insurance
- Real estate
- Cryptocurrency

Working with Charitable Impact provides added value to your business. With our support, you can help your clients give with confidence. Get in touch!

Robert Bancroft, MEd, FEA

• • DIRECTOR, CHARITABLE INVESTMENT PROGRAMS
 • • Mobile 1 604 908 3524 Phone 778 331 0572
 • • robert.bancroft@charitableimpact.com
 • • www.charitableimpact.com
 • •