



# Grow your business by helping clients with their giving

Set your business apart and strengthen client relationships by offering a new way to give back.

**Charitable Impact is a public foundation and donor-advised fund (DAF).** Your clients can use a DAF to set aside cash and non-cash assets for charitable giving, receive an immediate tax receipt, then take time to decide how to use their donation.

With our support and charity expertise, you can help your clients make an impact and grow your business at the same time.

## Working with Charitable Impact enables you to:

### Strengthen client relationships

Remain your clients' advisor of choice. Expand your service offering by helping them manage their charitable giving.

### Retain and grow assets under management

Continue to earn and charge fees when clients invest donated assets.

### Offer charitable giving support to clients, without being an expert

We're here to support discussions about donation and gift planning. Think of us as philanthropic advisors to you and your clients.

### Use one low-cost, high-value solution to help clients give

Process donations for all of your clients with Charitable Impact, no matter which causes or charities they support. We take away the administrative burden from donating assets and make managing charitable investments straightforward.

### Plan the use of your clients' money in a meaningful way

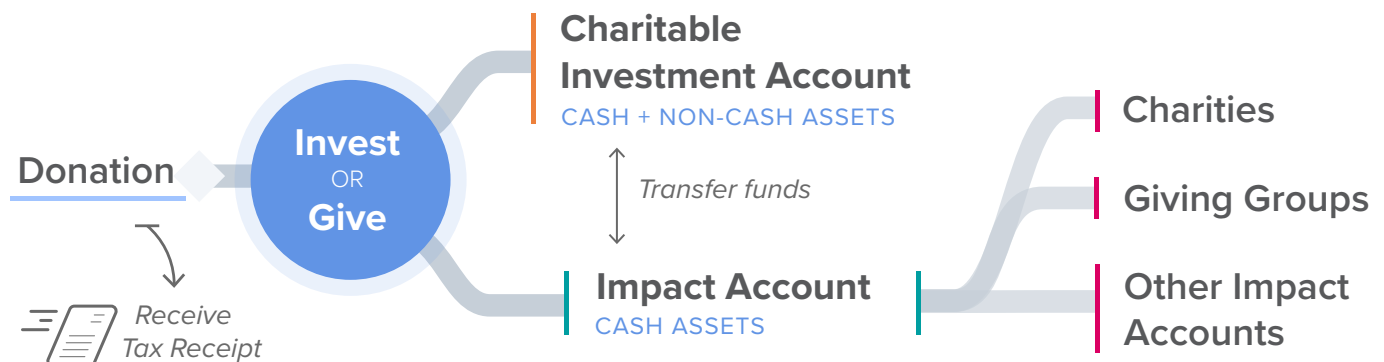
Your clients trust you to build the best financial plan for their unique goals. Help your clients increase their tax savings, grow their charitable assets over time, and make a greater impact on the causes that matter to them.



## Charitable Impact accepts donations of:

- Cash
- Publicly traded securities
- Private company shares
- Life insurance
- Real estate
- Cryptocurrency
- Art

## How It Works



When your client makes a donation, they receive an immediate tax receipt for the fair market value of the assets. By donating appreciated publicly traded securities, they benefit from a capital gains exemption that increases their tax savings. Invested charitable assets can continue to grow in the Charitable Investment Account, and you can continue to manage them according to our investment policy guidelines.

When your client is ready to use the donated assets to send gifts, the assets are liquidated to their Impact Account. Your client can use their Impact Account to send money to Canadian registered charities, Giving Groups, and to friends and family to inspire others to give. It's a new way of managing charitable gifts, all from one place.

## About us

Wanting to help others comes naturally, but knowing how to make a difference through charitable giving doesn't. We offer personalized, cause-neutral giving support to help your clients navigate, plan, and carry out their charitable decisions.

Charitable giving is what we do, and we're here to help your clients understand the charity world so they can give back in a meaningful way. Since 2011, more than \$1 billion has been donated by the Charitable Impact community, with thousands of charities benefiting from the generosity of donors across Canada.

## Working with Charitable Impact can expand your service offering.

Get in touch with us

- [advisors@charitableimpact.com](mailto:advisors@charitableimpact.com)
- [charitableimpact.com/advisors](https://charitableimpact.com/advisors)