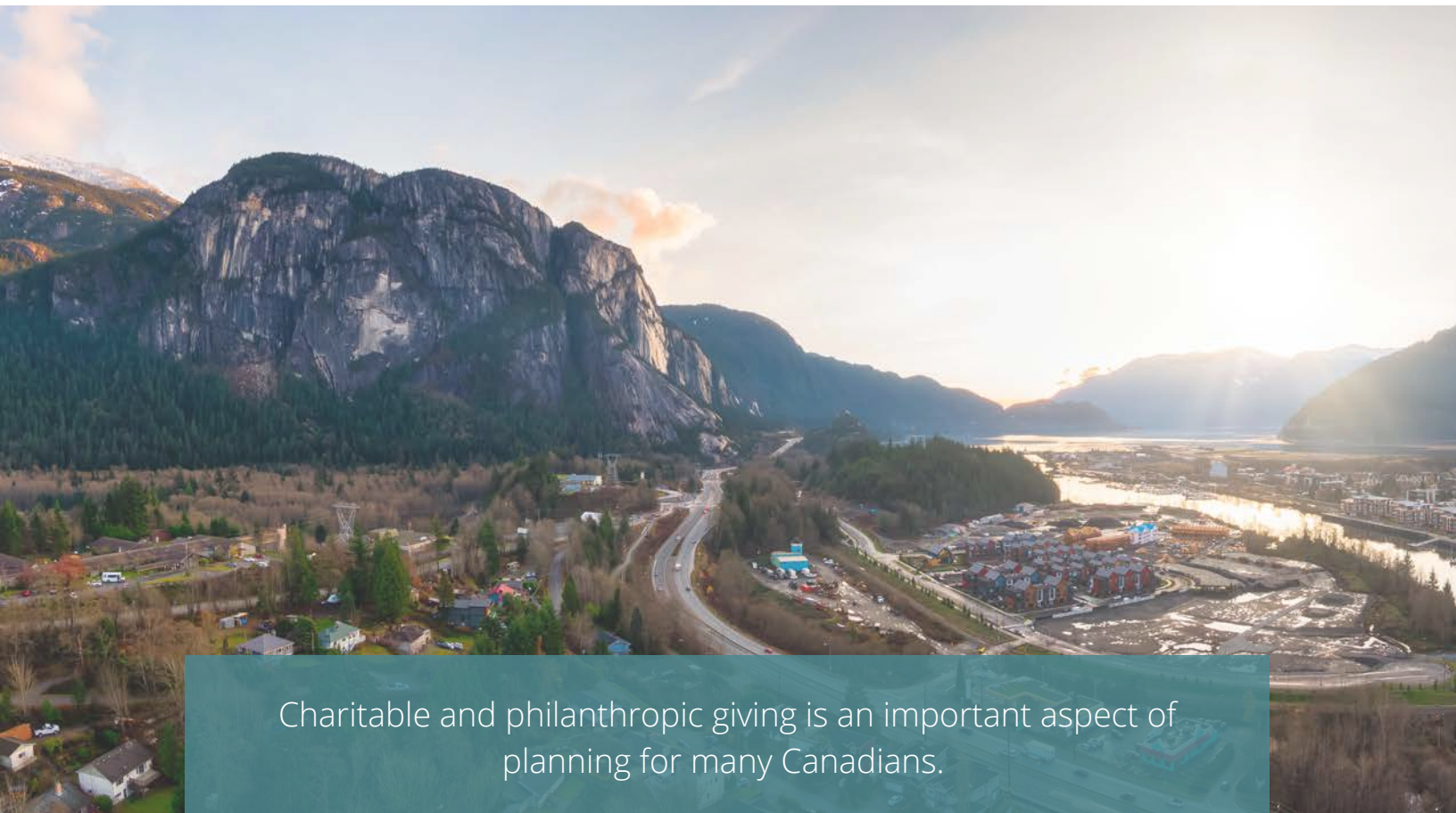




Growing Together, Giving Back

A Helpful Guide for Professional Advisors



Charitable and philanthropic giving is an important aspect of planning for many Canadians.

This guide has been developed for lawyers, notaries, accountants, financial planners, life insurance agents and trust officers, to understand the work of the Squamish Community Foundation and to feel confident recommending the Foundation to your clients.



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Who is the Squamish Community Foundation?

The Squamish Community Foundation (SCF) serves as a trustee for charitable, educational and cultural purposes. We are an independent community charity, governed by a volunteer board of community leaders, administering funds donated by community-minded citizens for the benefit of the people of Squamish.

Why use this guide?

Most often, your clients are looking for ways to plan for the future. Whether it's the best way to prepare for tax season, or looking to leave a lasting impact in their community – your clients are looking to you for advice. There are a number of options that you can present to your clients, but the SCF offers your clients various options while dealing with one organization.



The SCF has been committed to Squamish for many years. It has supported a wide array of charities and students - often acting as a kick-starter for projects that have had a lasting impact on the community at large. We can help you provide choice to your clients. The Foundation has a number of options within our portfolio that will help your clients meet their philanthropic goals, whatever they may be. But more than that, the Foundation is committed to the community where your clients live, work, and play. Introducing your clients to the benefits of working with the SCF shows that you understand their desire to make a lasting impression within the community. We want to help you, help your clients make a difference. We've gathered all the information we think you'll need to understand how the Foundation works, and why it's a solid option for your clients.

Is Partnering With the Squamish Community Foundation Right for Your Clients?

There are so many options when it comes to charitable giving. Often, it's difficult to even know where to begin. Here are some questions you can ask, to you better understand your clients' philanthropic goals:

- Do I have clients that care deeply about specific issues in their community?
- Do they give to one or more charitable causes?
- Are they interested in creating a personal or family legacy in their community?
- Do they want their donation to have a lasting impact in the community, or for a particular group?
- Do they want to make a difference, but aren't sure where or how to start?
- Are they considering a private foundation, but are concerned about cost and complexity?
- Do they want to receive maximum tax benefit for their charitable contributions?

If you answered yes to any of these questions, then your clients could benefit from a partnership with the Squamish Community Foundation.

We support the Squamish community through annual grants to local charities that support a wide range of worthy causes including youth, seniors, health and wellness, education, the arts, environment and social services. We manage two scholarships that have benefitted many local students.



Why the Squamish Community Foundation Makes Sense

Above all else, the SCF offers your clients choice and simplicity.

Choice

Your clients have the flexibility to direct their own charitable giving to reflect their personal goals. Whether they want to address what they see as an urgent need in the community, memorialize a loved one, or support students seeking post-secondary education, we have a giving option to help them make an impact and improve the lives of others in their community.

Simplicity

The process of establishing a fund or setting up planned giving may seem overwhelming, but we make it as simple and convenient as possible. We offer a variety of different fund types, including Designated Funds, Field of Interest Funds, and Unrestricted Funds. We're so appreciative of the support from our donors throughout Squamish. If your clients are looking for a more integrated donor experience, we are more than happy to meet with you. We can provide you with the tools to show your clients how the Foundation works, and how a donation can help meet their goals and support causes they care about.

How Can Your Clients Donate?

Donating is a great way to both give back to your community and leave a lasting legacy. Whether your clients intend to donate in honour of a loved one or support a community initiative they're personally passionate about, let us help create a personalized charitable giving plan that represents their vision and values. Your clients can choose a local cause to fund or ask our Board of Directors to identify a non-profit on their behalf.



There are a number of ways to give as an individual:

- Personal donation, or a gift during their lifetime either one time, monthly, annually, etc.
- Bequest, given by way of a will for a specific amount. Please have your client inform the SCF if they have made a bequest to us in their will.
- Life insurance, which can be an ideal way to create a major gift at a relatively low cost to the donor.
- Gifts of appreciated stock or real estate. Donors can gift securities in kind and thereby receive both the tax receipt and the capital gains exemption.
- Administrators of existing organizations or trusts may find it practical and efficient to transfer assets to a named fund within the SCF.
- A gift In Memorium or In Honour of a friend or family member.

Set Up an Endowment Fund*

Endowed funds are invested in perpetuity and grants are made from the income earned on the endowment. *Note: There is a minimum initial donation of \$10,000 to start a new endowment fund.

Unrestricted Endowment Funds

Your client may choose to create or make their gift to an Unrestricted Fund, allowing the SCF to proactively respond to critical needs as they arise in the community, including future needs that often cannot be anticipated at the time their gift is made.

Field of Interest Endowment Funds

They support an area of community life that is important to them, such as youth or the environment when making their gift to a Field of Interest Fund. This fund type provides grants to local charities working in their field of choice.

Designated Endowment Funds

By establishing a Designated Fund, your client has the opportunity to designate which particular charity(s) they would like to support in perpetuity. The SCF manages the annual distribution to those charities.



Reasons for Your Clients to Give to the Squamish Community Foundation

We are local

We live here. Our donors live here. Our recipients live here. We support a growing number of local charities and students every year.

We are connected

Because we are truly local, we're connected to our community's needs. We play an integral role in many community leadership initiatives. We can responsively address needs, fill gaps, and fund progress.

We listen

We fund programs and projects that address our community's priorities. Even some that would not otherwise get off the ground. But further to that, we help our donors create the kind of fund that fits with their goals and vision.

We are flexible

We work with the financial services community to create and accommodate a wide variety of donation options, including publicly traded securities, life insurance, beneficiary designations, and bequest gifts.

We focus on impact

We support grant recipients who demonstrate strong, sustainable impact for our community. We know even a small grant can have a large impact.

We care

Our Board of Directors is comprised of talented, passionate residents of Squamish. Each Director is committed to our mission of inspiring giving and connecting donors to community causes they value, investing grants in people, groups and community impact and building community knowledge, engagement and leadership.

Pooling for benefit

Donations to our endowment funds have the benefit of strength in numbers. By pooling resources with the Vancouver Community Foundation, we can generate bigger returns over time – which in turn means more money goes back to our community.

Always

Always is a long time – but that is at the very core of how we are structured. Our funds are designed to last in perpetuity, which means the Squamish community can count on our continued support.

Shining a light

Our granting process shines a bright light on charities throughout Squamish promoting the great work that they do, and the positive impact they have in our community.

Some Helpful Tools and Resources

Sample Wording in Wills

1. GIVE WHERE THE NEED IS GREATEST: To give [\$___ / ___ % / the residue] of my Estate to Squamish Community Foundation, charitable registration #882548902RR0001, to establish a fund known as the _____, the income of which shall be paid for general charitable purposes in conformity with the objectives of Squamish Community Foundation.
2. GIVE TO A FOCUS AREA CLOSEST TO YOUR HEART: To give [\$___ / ___ % / the residue] of my Estate to Squamish Community Foundation, charitable registration #882548902RR0001, to establish a fund known as the _____, the income of which shall be paid for general charitable purposes, having regard to my interest in _____.
3. GIVE TO YOUR FAVOURITE CHARITIES: To give [\$___ / ___ % / the residue] of my Estate to Squamish Community Foundation, charitable registration #882548902RR0001, to establish a fund known as the _____, the income of which shall be paid to _____[list designated charity or charities, & their charitable registration number].
4. GIVE TO AN EXISTING FUND: To give [\$___ / ___ % / the residue] of my Estate to Squamish Community Foundation, charitable registration #882548902RR0001, to be added to the _____ Fund [insert exact fund name]

Opportunities to talk about philanthropy

There are a number of opportunities to discuss philanthropy with your clients. If your clients would like to discuss other ideas they have on how to give to the SCF, we would be more than happy to set up some time to discuss the opportunities. We are available to chat virtually, over the phone or in-person.

Donations to the Squamish Community Foundation have a lasting impact on Squamish immediately and for years to come. Our many thanks are extended to you and your clients for their consideration and generous contributions to the Foundation.



For more information on how you can make a difference in your community, please contact:

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CRA Charity Number: 882548902RR0001