

**FOR THE LOVE OF
COMMUNITY**



PROFESSIONAL ADVISORS TOOLKIT

Helping you help your clients reach their philanthropic goals
Start a conversation about the power of giving in estate planning

Growing Together, Giving Back



Helping your clients create meaningful charitable legacies

Whether your client is updating their will, planning for retirement, or making a significant charitable gift, your client looks to you for guidance when it comes to taking care of the most important areas of their life - their family, their business, and their legacy.

At the Squamish Community Foundation, we work alongside lawyers, accountants, financial advisors, and estate professionals to help clients achieve both their charitable and financial goals. Whether a client wishes to make a gift during their lifetime, include a charitable legacy in their estate plan, donate securities, or establish an endowment, we provide the expertise and administrative support to make the process seamless.

We work collaboratively with your team to deliver charitable solutions that align with your client's overall financial, tax, and estate planning objectives. Together, we can help your clients create meaningful legacies that benefit both the people they care about, and the community they love.



By partnering with the Squamish Community Foundation, you can offer clients:

- **Local philanthropic expertise** - we understand the needs, opportunities and charities of Squamish
- **Tax-efficient, flexible giving strategies** - from a single gift to a permanent endowment, structures to fit each client's goals
- **Simplified giving, Long-term stewardship** - we handle the administration so clients (and their families) don't have to
- **Lasting community impact** - gifts are connected to the greatest opportunities for impact, now and for future generations

Professional Advisor Promise

When you refer a client to us, we promise to:

- Respect your client relationship
- Never provide financial or legal advice
- Work collaboratively with your team
- Keep you informed, with client permission
- Make the charitable process easy, and honour donor intent

Endowments Funds

The Squamish Community Foundation's work is founded on building endowment funds - **one of the most powerful ways to create lasting community impact**. Unlike one-time gifts, endowment funds are **invested to grow over time** creating a permanent dependable source of community funding. Each year the investment income is granted back to the community through our Annual Grants program, while the original gift remains intact — ensuring today's generosity continues supporting local priorities for generations.

How Endowment Giving Creates Lasting Impact

1. Your client makes a charitable gift during their lifetime or through their estate.
2. The gift is invested in a permanent endowed Fund.
3. Investment income is earned while the original gift remains intact.
4. From the endowed Fund's investment income, Annual Grants are distributed to local charities, scholarships, and community initiatives.
5. The Fund continues supporting the community forever. This is one of the biggest differentiators between a community foundation and direct charitable giving.

Types of Endowment Funds

Every donor's vision is different. That's why we offer a range of endowment fund options, giving the flexibility to support the causes, organizations, or community priorities that matter most to donors. There is a minimum initial donation of \$10,000 to start a new endowment fund.

Unrestricted

Allows the SCF to respond to critical and emerging needs, including ones that can't be anticipated today

Donor Advised

Gives the donor ongoing input into which registered charities receive support

Designated

Supports specific named charity(s) in perpetuity.

Field of Interest

Supports an area of community life that the client cares about, such as youth or the environment

Agency

Held on behalf of a local charity to build its own long-term reserve

Scholarship

Provides financial support for local graduating students attending post-secondary education

Community Impact

Every endowed gift creates lasting community impact. Investment income generated from endowed funds is distributed each year through grants to local charities, non-profits, and scholarship, ensuring your clients' generosity continues to support Squamish for generations to come.

Our Established Funds Currently Support

- Health, Social Development and Housing
- Environment and Sustainability
- Music and Performing Arts
- Seniors
- Indigenous initiatives
- Scholarships
- Youth programming
- Community wellbeing
- Urgent and emerging community needs
- Sports and recreation

These are just some of the community priorities currently supported through existing Funds. Clients may establish a new named endowed Fund to support a different community priority that reflects their values, family, business, or community interests.

2026 Community Impact

**Granted
\$51,500
to local charities**

**22
Non-Profits
Supported through
Annual Grants**

**2 Scholarships
Awarded
\$4,500**

Community Impact In Action

"Funding from the Squamish Community Foundation helped support much needed recreational programming in Squamish.

Whistler Adaptive Sports

We are beyond grateful for the Squamish Community Foundation's support. We're incredibly excited about the opportunity to make a meaningful impact in the community through our program.

First Tee



Ways to Give

Giving options for your clients

There is no one-size-fits-all approach to charitable giving. The Squamish Community Foundation offers a range of cash and non-cash giving options to help your clients achieve their philanthropic and financial goals, whether they choose to give during their lifetime or through their estate. Clients can choose to support an existing Endowed Fund that aligns with the causes they care about, or establish their own named Endowed Fund to create a personalized charitable legacy.

Visit our website www.squamishfoundation.com to learn more about giving options and download the Canadian Charitable Gift Matrix or contact us at: info@squamishfoundation.com

CASH

Cash gifts are the simplest and most flexible way to give. Clients can make a one-time or recurring donation during their lifetime, or bequest a specific dollar amount, percentage of the estate, or residual gift in their Will.

SECURITIES

Donating publicly traded securities is one of the most tax-efficient ways to give. By transferring eligible securities directly to the Foundation, clients may eliminate capital gains tax while receiving a charitable tax receipt for the full fair market value. Securities may also be gifted through an estate.

LIFE INSURANCE

Life insurance can be an affordable way to make a significant charitable gift. Clients may name SCF as owner and beneficiary of a policy for a tax benefit during their lifetime, or name SCF as the beneficiary of the policy at death.

REAL ESTATE

Residential, recreational, commercial, or investment properties may be donated to create a lasting charitable legacy. Because every property is unique, gifts of real estate should be discussed with the Foundation and the client's professional advisors early in the planning process.

RRSP RRIF

Naming the Foundation as the beneficiary of an RRSP or RRIF may reduce taxes payable by the estate while creating a lasting charitable legacy.

In Honour or In Memory

A meaningful tribute can be created through either a lifetime or estate gift. Clients may make a donation to an existing Fund in honour or memory of a loved one, or establish a named endowed Fund that celebrates an individual, family, or organization while creating a lasting community legacy.

Advisor Resources

Sample Bequest Language

Including a charitable bequest in a Will is a simple way to make a lasting gift. The clauses below cover the most common ways clients choose to structure a charitable bequest. Use whichever fits your client's intent, and fill in the blanks together.

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.

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 _____ .

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].

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]

Frequently Requested Resources

Visit Our Website
www.squamishfoundation.com for:

- Downloadable sample Will clauses
- Securities transfer forms
- Professional Advisor eResource
- FAQ's
- Fund Information
- Community Impact Stories
- Grant information

Let's Work Together

Helping Your Clients Create a Lasting Community Legacy

We'd be pleased to meet with you or your clients to explore charitable giving opportunities. We can participate in planning conversations, answer questions, and help develop personalized giving solutions that align with your clients' values and financial goals.

Contact Us When Your Client

- Is ready to establish an endowment fund with SCF, today or in their Will
- Is making a donation to a SCF fund today, or as a gift in their will and is looking for advice on which fund to donate to
- Is updating their will or planning retirement
- Is selling a business or has appreciated securities to donate
- Has recently inherited wealth
- Is considering a private foundation, or wants to support multiple charities
- Wants to involve their family in giving, or doesn't know where to start.

How We Work With You

- We work in partnership with professional advisors—we don't replace your role.
- We provide confidential, no-obligation philanthropic consultations.
- We help clients explore giving options that align with their values and goals.
- We explain how community foundations and endowment funds work.
- We identify opportunities that support both the client's charitable objectives and community priorities.
- We coordinate with you throughout the planning and implementation process.

What Happens Next?

- Connect with us for a confidential conversation at info@squamishfoundation.com or 604.848.8683
- We explore your client's charitable goals together
- We develop a personalized giving strategy
- You continue leading the financial, legal, and tax advice
- The Foundation establishes and administers the charitable gift or Fund

Together, we can help your clients create a charitable legacy that reflects their values while strengthening the Squamish community for generations to come.



Let Us Support Your Next Charitable Planning Conversation

Whether your client is making a gift today or planning their charitable legacy for tomorrow, we're here to support you.

The Squamish Community Foundation works collaboratively with professional advisors to help clients achieve meaningful charitable impact while meeting their financial, tax and estate planning goals.

Contact Us

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[@SquamishCommunityFoundation](https://www.instagram.com/SquamishCommunityFoundation)

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