



PROFESSIONAL ADVISORS TOOLKIT

Deepen your relationship with clients by helping them connect their philanthropic intentions with meaningful strategies.



Helping you meet your clients' charitable goals

Your clients rely on you to understand what matters to them—their family, their business, their values and the legacy they hope to leave. When charitable giving becomes part of that conversation, you may need charitable expertise, local knowledge and a trusted organization to help put their plans into action.

The Squamish Community Foundation is a resource you can draw on when you need it. We provide charitable expertise and administrative support while you remain at the centre of your client relationship.

We can help you:

- **Explore charitable options** – information about giving approaches that can complement the financial and estate strategies you develop with your client.
- **Navigate local giving** – insight into local causes, organizations and opportunities.
- **Facilitate charitable gifts** – including gifts of securities, estate gifts and charitable funds.
- **Provide long-term stewardship** – administering funds and honouring donor intent over time.



Consider Contacting Us When Your Client:

- Wants to include charitable giving in their financial or estate plan
- Is updating their will or planning for retirement
- Has appreciated securities or other assets they are considering donating
- Has recently experienced a liquidity event, inheritance or significant change in wealth
- Wants to support several charities or causes
- Is thinking about involving children or future generations in family philanthropy
- Wants their charitable giving to continue beyond their lifetime

Finding the Right Charitable Solution

Your clients may not begin by asking for a charitable fund. They may simply tell you they want to give back, make a difference, support a cause they care about or leave something meaningful behind. Every client's goals are different. Understanding what matters to them can help you identify giving opportunities that complement their broader financial and estate plans. For those who want their giving to extend beyond a single gift, an endowment can create long-term impact while reflecting the values and causes that matter to them.

Starting The Conversation

You don't have to wait for a client to raise charitable giving. A simple question can open the door to understanding what matters to them and whether philanthropy could be part of their broader financial or estate plan.

Try asking:

"Are there causes or organizations that you'd like your financial or estate plan to support?" or "Have you thought about leaving a lasting legacy for your community or a cause that matters to you?"

Your Clients May Be Considering

GIVING NOW

Cash, appreciated securities or other assets can allow clients to see the impact of their philanthropy during their lifetime.

GIVING THROUGH THEIR ESTATE

A charitable gift in a will, life insurance policy or registered account can allow clients to provide for the people they care about while also supporting causes that matter to them.

CREATING SOMETHING LASTING

An endowed fund can establish a permanent charitable legacy aligned with a client's interests and intentions.

Trusted Stewardship. Meaningful Impact.

Your clients want confidence that their charitable gifts will be responsibly managed and used as intended. SCF provides long-term stewardship supported by established investment, governance and granting practices.

1.8M+

assets under
stewardship

1.8M+

granted since
2003

\$51,500

granted to 22
organizations
in 2026

\$4,500

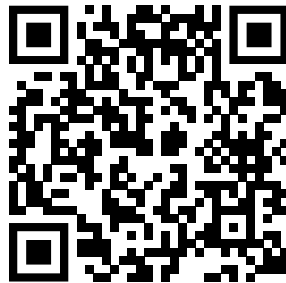
granted in
scholarships in
2026

Professional Advisor Resources

You don't need to be a charitable giving specialist. We provide the charitable knowledge and resources you need when giving becomes part of your client's financial or estate planning.

Visit our website for information on:

- Gifts through a will
- Gifts of securities
- Endowment and fund options
- Sample charitable bequest language
- Charitable gift planning resources
- Community impact and granting information



Have a client situation you'd like to explore?

Contact us for a confidential conversation.

We can answer charitable giving questions, provide information about available options, or help you prepare for a conversation with your client.

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**SQUAMISH
COMMUNITY
FOUNDATION**