



## The South Saskatchewan Community Foundation for Professional Advisors

### *Helping You & Your Clients with Charitable Giving*

With 84% of Canadians contributing to charity on an annual basis\*, charitable giving is becoming an increasingly important part of your client's overall financial plan.

Add charitable planning to your practice - or enhance what you already do - with practical online tools and resources designed for you and your clients.

Community foundations can help you build a stronger relationship with your client and make a difference in your community at the same time.

At the South Saskatchewan Community Foundation, we understand the vital role professional advisors can play in identifying creative solutions to help clients realize philanthropic goals while maximizing tax benefits.

The Community Foundation offers a degree of flexibility that sets it apart from other charitable organizations. Plus, we have a long history of working with advisors to create customized charitable gift plans that meet the needs of the community, and realize their clients' charitable wishes.

Whether clients wish to make a gift now or later, by partnering with the Community Foundation, you may be able to help them reduce taxes, increase their heirs' inheritance, create a legacy in their community, and help them teach their children and grandchildren the value of philanthropy on a personal and community level.

Are you and your client interested in learning more about the South Saskatchewan Community Foundation?

Call us at 306-751-4756 to book an appointment, or visit our website for more information about SSCF [www.sscf.ca](http://www.sscf.ca)

\* Note: Source: Caring Canadians, Involved Canadians: Highlights from the 2007 Canada Survey of Giving, Volunteering and Participating, Michael Hall, David Lasby, Steven Ayer, of Imagine Canada and William David Gibbons, Statistics Canada, 2009.



Helping Good People  
Do Great Things

### Contact Us

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COMMUNITY  
FOUNDATIONS  
OF CANADA  
*all for community.*



South  
Saskatchewan  
Community  
Foundation

## Information for Professional Advisors





## Benefits of working with the South Saskatchewan Community Foundation

### Maintain control of your client relationship

We're here to help you provide current information on philanthropic options.

### Donate a variety of assets

We accept and issue receipts for a wide variety of assets, including cash, securities, insurance, or real property either as current gifts or as part of an estate plan.

### Charitable giving expertise

With over 45 years of serving our community, we provide a valuable service to your clients. We offer truly flexible options to suit your clients' giving, the benefits of pooled investments regarding fees and returns, and whatever level of anonymity or recognition is preferred.

### Access to community knowledge

As a direct result of our community research and granting process, we are aware of both the critical and emerging needs in southern Saskatchewan. This allows you to help your clients make the most effective choices for community support.

### A way to connect across generations

When you help families create a donor-advised fund, you can stay involved with the family for generations.

### Our staff are here to help:

Contact [sscf@sasktel.net](mailto:sscf@sasktel.net)  
or call 306-751-4756.

## Toolkit for Professional Advisors

We offer numerous resources to help you and your clients achieve their charitable wishes. One of the most comprehensive resources is the *professional advisors' e-resource centre* from our national partner, Community Foundations of Canada. The centre offers information and tools on topics such as:

- Talking about charitable giving
- The life stages of giving
- Giving options
- Top reasons to choose to work with a community foundation

Visit: [www.cfc-fcc.ca/pa-eresource](http://www.cfc-fcc.ca/pa-eresource)



## Professional Financial Advisor Program at SSCF

Refer your client to SSCF and keep managing your client's philanthropic donor advised fund at SSCF.

The Professional Financial Advisor Program lets you help your clients attain their charitable/philanthropic dreams while at the same time allows you to retain current earnings by continuing to manage your client's portfolio. Your client continues to work with you – their trusted and respected Professional Financial Advisor – to be able to set up a fund at SSCF and fulfill their charitable giving goals, and you can best advise them on which assets in their portfolio would be most beneficial for them to donate to their SSCF fund.

Minimum referral amount is \$100,000 to be able to manage the client's fund at SSCF. Your client may take 5 years to reach this amount at \$20,000 installments per year, or the amount the client's accountant or tax advisor advises them would be the most beneficial in the year the "gift" is made to their fund at SSCF.

