Talking Philanthropy

A "Cheat Sheet" for Professional Advisors

Why have the conversation?

- Increasingly clients expect it as part of a "full service" approach
- Proper tax and estate planning help clients reduce taxes and preserve wealth
- It provides an opportunity to understand your client's values and priorities
- It helps create a relationship with the spouse and/or next generation
- Philanthropy makes the world a better place!

When do you have the conversation?

- At the sale of a business
- Upon receipt of a financial windfall such as an inheritance
- When revising or writing a will
- As part of estate planning

How do you begin the conversation?

The key is to listen, then ask questions to learn more:

- "I see you've always given to xx charity. How does this reflect your values?"
- "As you look ahead, have you thought about what you'd like your legacy to be?"
- "What have been the most satisfying causes you've given to? Tell me more..."
- "You've told me that you want to leave everything to your 3 children. Have you ever
- considered including a gift to the community as your 4th child?"
- "You've asked me what charity you should give to. Instead of jumping to answer that, can we first talk more about your interests and the issues you think are important?"

Help your clients expand their thinking from charitable giving to philanthropy:

- "You seem very passionate about the environment and do volunteer work in this area. Have you ever considered how you might use your charitable giving or investments to make an even bigger difference in this area?"

Draw in other resources to help you.

- As a trusted advisor you have a key role, but don't hesitate to draw on other expertise related to philanthropy.
- Learn more about issues. In south Saskatchewan for example, check out the SSCF Vital Signs Reports.
- The Canadian Association of Gift Planners, Community Foundations of Canada, and Private Foundations of Canada provide valuable information for advisors.
- Imagine Canada provides important sector information.
- Reach out to philanthropic advisors in your network and invite them to join your team.

Differentiate yourself.
Include Philanthropy as part of the conversation.

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South Saskatchewan Community Foundation

Key Dates Throughout the Year

South Saskatchewan Community Foundation will connect with you throughout the year with regular updates.

Below are some key dates in the Fund management cycle.

The information on this page was last updated on: November 1, 2021

JAN

Our fiscal year begins.

MAR

SSCF's newsletter is distributed.

You will receive an update of your Fund(s) confirming the amount available to grant.

MAY

May is Leave a Legacy month.
Watch for information.

Charity survey is distributed.

JUN

We look forward to your participation in an annual donor event. We hope you will join us.

SSCF's annual report is distributed.

JUL

Watch for our biannual donor survey.

SEPT

SSCF's newsletter is distributed.

OCT

Vital Signs update on the quality of life in south Saskatchewan.

NOV

Deadline for submitting grant recommendations to ensure payment before the end of the year.

SSCF's newsletter is distributed.

DEC

Make your donation to your Fund(s) to ensure charitable tax receipts can be obtained for the current fiscal year.

Non-cash donations need to be initiated by December 1 to ensure charitable tax receipts can be obtained for the current fiscal year.

Online cash donations can be made at:
sscf.ca/ways-to-give

Give today.
Grow forever.

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