

A Branded Donor Advised Fund for your Firm



For over a decade, the Place2Give (P2G) Foundation has been working with individuals and families to achieve their charitable vision. We believe that everyone can be a philanthropist. As such, we have created a unique program for you and your firm allowing your clients to benefit from the philanthropic services offered through Place2Give while retaining their assets under your management.

We know that engaging your clients more fulsomely and inter-generationally is always top of mind, and we know that philanthropy speaks to individuals and families more than just the dollars and cents in the account. Place2Give Foundation provides a unique set of customized services to tap into the emotional side of your clients financial plan.

HOW OUR PROGRAM FOR FINANCIAL ADVISORS WORKS

Place2Give Foundation is a public foundation that offers Donor Advised Fund (DAF) accounts. We provide a branded, full-service DAF solution to financial institutions. A DAF program in partnership with Place2Give allows you to:

- › Expand your client offering and increase your charitable assets under management
- › Leverage our philanthropic expertise to benefit your clients and advisors
- › Provide your advisors with a planning tool that can extend to multiple generations
- › Focus on growing the DAF program, while we act as the fiduciary manager and fully support all administration
- › Provide immediate tax savings

Working with you to assist your clients' philanthropic objectives by retaining your clients' assets under management, Place2Give Foundation has two unique avenues of engagement:

- › **Endowment Fund:** These funds are whitelabeled for your firm and can be named for your clients' legacy. This is a long-term investment in philanthropic activities that can span generations thereby securing your connection to your clients and their families.
- › **Flow-Through Fund:** Unlike other DAFs Place2Give Foundation provides your firm with a branded charitable fund that can be used for one-off donations to Canadian registered charities AND for special projects in the US and Mexico.

For both of these funds, they can be whitelabeled for your firm and can be named as part of your clients' legacy.

Place2Give Foundation assumes all of the administrative, legal and technical aspects of managing your White-Label DAF program, including gift acceptance, grant due diligence and distribution.

P2G's staff provides prompt and professional support to both advisors and clients. You may determine custody of the charitable assets and recommend how they will be invested, based on P2G's Investment Policy. P2G can provide your advisors with marketing materials, education and online support to strategically and successfully market the DAF to clients.



PROGRAM ADVANTAGE

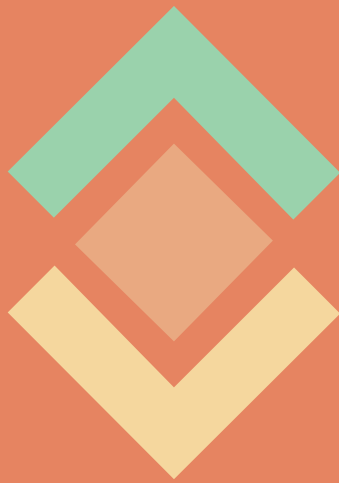
This program offers a number of benefits for financial advisors, your firm and your clients:

- 1. Asset Retention:** Advisors retain and manage client charitable assets at their financial institution on an ongoing basis on behalf of the Place2Give Foundation.
- 2. Unique Opportunities:** P2G offers a unique opportunity for advisors and families to develop a deeper emotional understanding and connection as to the purpose of their wealth and financial objectives (i.e. legacy).
- 3. Multi-Generational Client Retention:** With over \$1Trillion expected to transfer between generations in the coming decade, money is on the move. Advisors who work with the whole family are more likely to retain the next generation as a client than those who focus on the primary account holder.
- 4. Non-Managed Assets:** Non-managed client assets, such as real estate, closely-held business interests, personal property and art can be converted into charitable funds that are managed through the program.
- 5. International Giving:** Giving internationally can be challenging for a number of reasons. A unique feature of P2G is that it can offer your snowbird clients the ability to contribute charitable dollars to US and Mexican charities.
- 6. Market Differentiation:** Place2Give's Branded Donor Advised Fund program will provide you with a unique set of products and services that will make you stand out from your competition.
- 7. Place2Give handles all the heavy lifting on the philanthropy side so that your firm can focus on what you do best, managing your clients' wealth.**

IDENTIFYING CLIENTS WHO WOULD BENEFIT

Some examples of clients appropriate for this program include those who:

- > Had or are planning a liquidity event
- > Have high capital gains tax exposure
- > Are contemplating life transitions that impact wealth: retirement, estate planning decisions, inheritance, etc.
- > Want a charitable tax deduction now with the flexibility to make donations over time
- > Want to grow charitable contributions tax-free over time
- > Desire to create endowments benefitting multiple nonprofit organizations
- > Have expressed the wish to do cross border giving (CAN/US/MEX)
- > Want to support multiple charities, civic causes or issues
- > Wish to engage their children or family members in philanthropy and legacy



ABOUT PLACE2GIVE FOUNDATION

Place2Give Foundation, is a Registered Charity in Canada (833678840RR0001) with the mandate to:

- > Provide donors with the ability to make better, informed decisions about their charitable giving
- > Facilitating innovative solutions to wicked problems
- > To provide tools and resources for vetted non-profits the provide research driven solutions

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To learn more visit www.place2give.com

