



# Place2Give

Helping you help others

## Expand Your Value. Strengthen the Relationship.

Your clients want **strategic, personalized, tax-efficient philanthropy.**

Place2Give Foundation provides a flexible Donor Advised Fund (DAF) solution that enhances your advisory offering, deepens multi-generational relationships, and allows client assets to remain under your management. We handle the structure and administration while you strengthen the client relationship.

We believe everyone can be a philanthropist. By partnering with Place2Give, you can help individuals and families achieve their charitable vision while integrating philanthropy into their broader financial plans.

### The Advisor Advantage

Our program allows you to:

- Retain client assets under your management
- Maintain the primary client relationship
- Enhance your advisory value proposition
- Provide philanthropic expertise without building internal infrastructure
- Strengthen relationships across generations

### Ideal Referral Moments

Clients facing life transitions such as:

- High-income year
- Liquidity event or business sale
- Retirement transition
- Estate planning review
- Donation of appreciated securities
- Family legacy conversations

## Sophisticated philanthropic solutions, within assets under management.

Place2Give is a public foundation offering branded Donor Advised Fund solutions for financial advisors and institutions. Our partnership allows you to expand your client offering while we act as fiduciary manager and administrator, handling all compliance and operations.

We offer two flexible fund options;

#### Endowment Fund

A long-term philanthropic fund that can be named for your client's legacy and support charitable giving across generations.

#### Flow-Through Fund

A branded charitable fund designed for flexible giving supporting donations to Canadian registered charities.

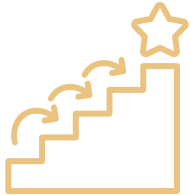
**Both options can be white-labeled for your firm and integrated into your clients' long-term philanthropic planning.**

# Why Place2Give Foundation



## Flexible by Design

We are intentionally personalized and nimble; allowing for responsive service, customized structures, and fewer institutional restrictions.



## Built for Every Stage of Wealth

Whether your clients are building their career, preparing for retirement, or navigating a business milestone; our structure evolves with them.



## Personalized Service

You work directly with our experienced professionals who understand both philanthropy and financial planning, not a call centre.



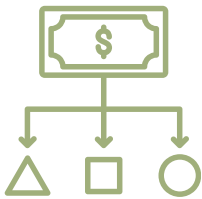
## Relationship-Driven Approach

We build meaningful connections between your clients and the charities they support. Removing the charity vetting and reporting onus from your busy workflow while still retaining you as the Trusted Advisor.



## Strategic, Multi-Year Giving & Venture Philanthropy

Forward thinking beyond annual grants. We help structure longer-term charitable commitments that provide stability for the organizations your clients support and clarity for their financial planning.



## Seamless Administration

We manage compliance, receipting, due diligence, and reporting, giving your firm the benefits of structure without the headache of managing a program outside of your expertise.



**Place2Give**  
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