

Advisors United 101

Guide your clients' philanthropic planning



Philanthropy is a passion and a priority for many Calgarians - an avenue to advance social change and create a legacy of impact. Through United Way of Calgary and Area's Advisors United program, you will gain specialized knowledge to help guide your clients philanthropic planning.

Together, we can make philanthropy as meaningful, efficient, and rewarding as possible for your clients.

WHAT IS ADVISORS UNITED?

United Way of Calgary and Area's Advisors United program is philanthropic resource hub for professionals across our community from accounting, financial planning, wealth management, insurance, and law. Advisors United has been developed for professionals that are dedicated to providing up-to-date and best-in-class philanthropy services to their clients, and educating people about the benefits of philanthropic giving.

Accessing Advisors United allows you to:



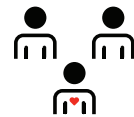
Learn about trends and issues in the social sector in Calgary and Area and stay current on your community's evolving needs



Gain exclusive access to philanthropic gift planning tools and resources to support your clients' range of interests



Receive exclusive invitations to events and learning opportunities to network with peers and allied professionals.



Increase your brand awareness and share your knowledge about the benefits of philanthropic giving in building a financial portfolio.

In Collaboration with United Way, **YOU WILL:**

- Enhance your suite of client services to include philanthropic support and insights;
- Build your relationship with clients by understanding what motivates and inspires them.; and
- Grow your knowledge to provide an impactful lens on philanthropic investments.

In Collaboration with United Way, **YOUR CLIENTS WILL:**

- Learn about the social issues that exist in their community and innovative opportunities to solve them;
- Further customize their philanthropic investments;
- Access facilitated philanthropic discussions; and
- Access unique tax benefits.

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VALUABLE OPPORTUNITIES AVAILABLE TO ADVISORS UNITED MEMBERS

Through our facilitation offerings, United Way can build customized philanthropy learning sessions for advisors. Topics of discussion may include:

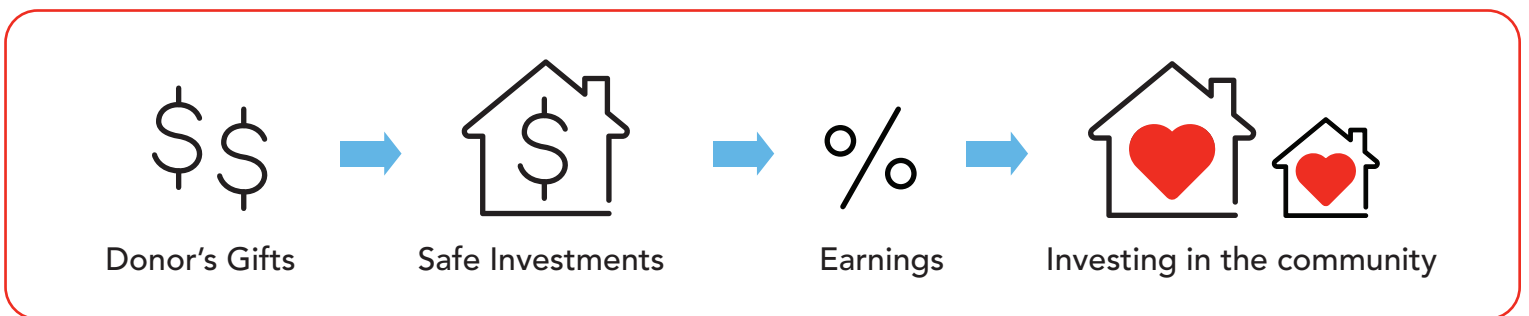
- Specific Social Issues in the Community
- Tax benefits of providing a philanthropic gift through: Family facilitation and Family Funds
- Gifts of Life Insurance
- Wills 101

SOCIAL INNOVATION

Many of the philanthropists you work with are seeking innovative ways to make an impact and provide value for many years to come. With United Way's reach and resources, we can work closely with you and your clients to map out large-scale investment options that help realize the change a donor wants to see in their community. By investing early, in new projects or innovation, your client has a unique opportunity to be a part of building a better tomorrow for our community.

THE TOMORROW FUND

The Tomorrow Fund is United Way of Calgary and Area's Legacy Fund - a long-term community investment for philanthropists who want to build powerful legacies that reflect their values and vision for the future. Planned Gifts that are designated to the Tomorrow Fund are invested for the long term, paying dividends by addressing pressing social issues and supporting local programs.



United Way of Calgary and Area
T: (403) 231-6265 F: (403) 355-3135
105 12 Ave SE, Calgary, AB T2G 1A1
www.calgaryunitedway.org
Charity Number: 13022 9750 RR0001