

Advise your clients

By integrating gift planning into your everyday practices, you will help your client fulfill their philanthropic projects by ensuring that they fully benefit from the fiscal advantages attached to donating to charitable organizations.

Many legal and fiscal regulations must be taken into consideration and your clients need your expertise and support. This contribution constitutes an added value for your client.

Planned Giving: an advantageous fiscal tool

A planned gift can result in a tax credit up to 48% of the value of the asset as long as the amount corresponds to the fair market value of the asset, determined by an independent third party.

Three points to take into consideration:

1. What organization or organizations does your client wish to support?
2. Do you know the tax-related and financial advantages of the different gift vehicles?
3. Which type of donation best fits the client's interests?

Overview of the different types of planned giving

- **How to discuss planned giving with your clients?**
- Legal and fiscal advisors' point of view

NEW !

A Guide for Professional Financial Advisors is Now Available for Download

The recent WealthProfessional.ca series, *10 Weeks/10 Ways*, was compiled into an eBook. The articles build on CAGP's 2014 study, **The Philanthropic Conversation**, and provide an array of facts, insights, and advice for professional financial advisors.