



Strategic Counsel
Leadership Donors
Families and Foundations



Give Canada Fundraising Corporation

About Us

Give Canada is uniquely positioned to help high net worth individuals and family foundations formulate comprehensive and effective giving plans.

- » We have facilitated hundreds of millions of dollars of transformational leadership gifts and corporate partnerships for the not-for-profit sector.
- » We have a solid understanding of the benefits to both the charity and donor, and an intimate knowledge of the leadership gift process.
- » Give Canada has a unique understanding of the needs and challenges faced by leadership donors who have a desire to give back to their communities in the most meaningful way.
- » We use a discreet and confidential process to explore and facilitate transformational gifts that acknowledge and celebrate a donor's wishes to contribute meaningfully.
- » We create innovative gifting strategies and help establish lasting legacies that make a tangible difference in the world.



Services for Leadership Donors

1. A Philanthropic Strategic Plan

Give Canada's process begins with getting to know the donor and their family. We explore with them their values, interests and philanthropic aspirations. From there we help the donor formulate a detailed roadmap for giving, one that simplifies future decision making and maximizes the impact of a donor's gifts.

In order to help the donor create a legacy that aligns with their values, the **Philanthropic Strategic Plan** considers:

- » Past support — a review of any annual gift pledges currently in place.
- » Current charities of choice.
- » Donor and family's interests by sector (education, health, sports, children, etc.) and specific charities.
- » The motivation for giving.
- » The preferred level of donation — are smaller amounts to a number of different charities preferred to several significant gifts to a select few?
- » The preferred designation of gifts — endowments, scholarships, buildings, centres of excellence or others.
- » Intended level of giving, including from a foundation (if applicable), its capitalization and any disbursement requirements.
- » Potential triggering events or future plans that affect giving.



Services for Leadership Donors

2. Evaluation & Recommendations

With the Philanthropic Strategic Plan in hand, Give Canada is well poised to evaluate the donor's many funding requests and opportunities.

Together with our knowledge and expertise, we conduct additional research to make valid recommendations.

This includes:

- » A review of funding requests received by the donor and/or foundation.
- » Researching, evaluating and sourcing potential charities that might fit the donor's current or future giving strategy and objectives.
- » Liaising between the donor and any not-for-profit organizations as and when required.
- » Presenting the donor with recommendations for suitable charities, including levels of gift, pledge period, potential donor recognition and any other relevant conditions.

3. Negotiation

Giving feels good. Unfortunately it is sometimes awkward and uncomfortable for the donor to finalize the details of a leadership gift agreement, especially when there is an existing and close relationship with the charity. Give Canada alleviates this situation by acting as a friendly facilitator.

Give Canada always represents the interests of the donor when negotiating gift agreements on their behalf. We help donors maximize the benefit of the gift and achieve optimal and preferential terms.

We fold into the donor's professional team of consultants, working with the donor's legal counsel and financial advisors to provide seamless counsel, efficient giving and favorable outcomes.



Further Considerations

Fee Structure and Expenses

- » Give Canada charges a fee for the development and presentation of the Philanthropic Strategic Plan. An hourly fee is charged for all other services.
- » All agreed upon expenses associated with Give Canada's work are borne by the donor, including agreed upon travel and office related expenses.

Why Give Canada

OUR EXPERIENCE

We have facilitated in excess of \$675 million in transformational leadership gifts and corporate sponsorships.

OUR KNOWLEDGE

Thanks to our experience, we have an exceptional understanding of the unique needs and challenges faced by leadership donors and their families.

OUR PROCESS

We work closely with donors to create an individualized Philanthropic Strategic Plan tailored to meet the donor's goals.

We take the lead on the administration, review and analysis of the donor's funding requests and resulting communication.

We represent the donor's wishes to not-for-profit organizations, removing the donor from the negotiation while ensuring the most tax effective and optimal terms for any gift agreement.



**“A MARK ON THE WORLD, A DIFFERENCE,
SOME PROOF THAT I HAD BEEN HERE,
SOMETHING TO SAY THAT I MATTERED,
THAT WHEN MY BODY LEFT THIS WORLD
MY SOUL HAD MADE ITS IMPRINT”**

Eva Dien Brine Markvoort (1984-2010)
Cystic Fibrosis sufferer and
double lung transplant recipient



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