

# Generosity Plan™

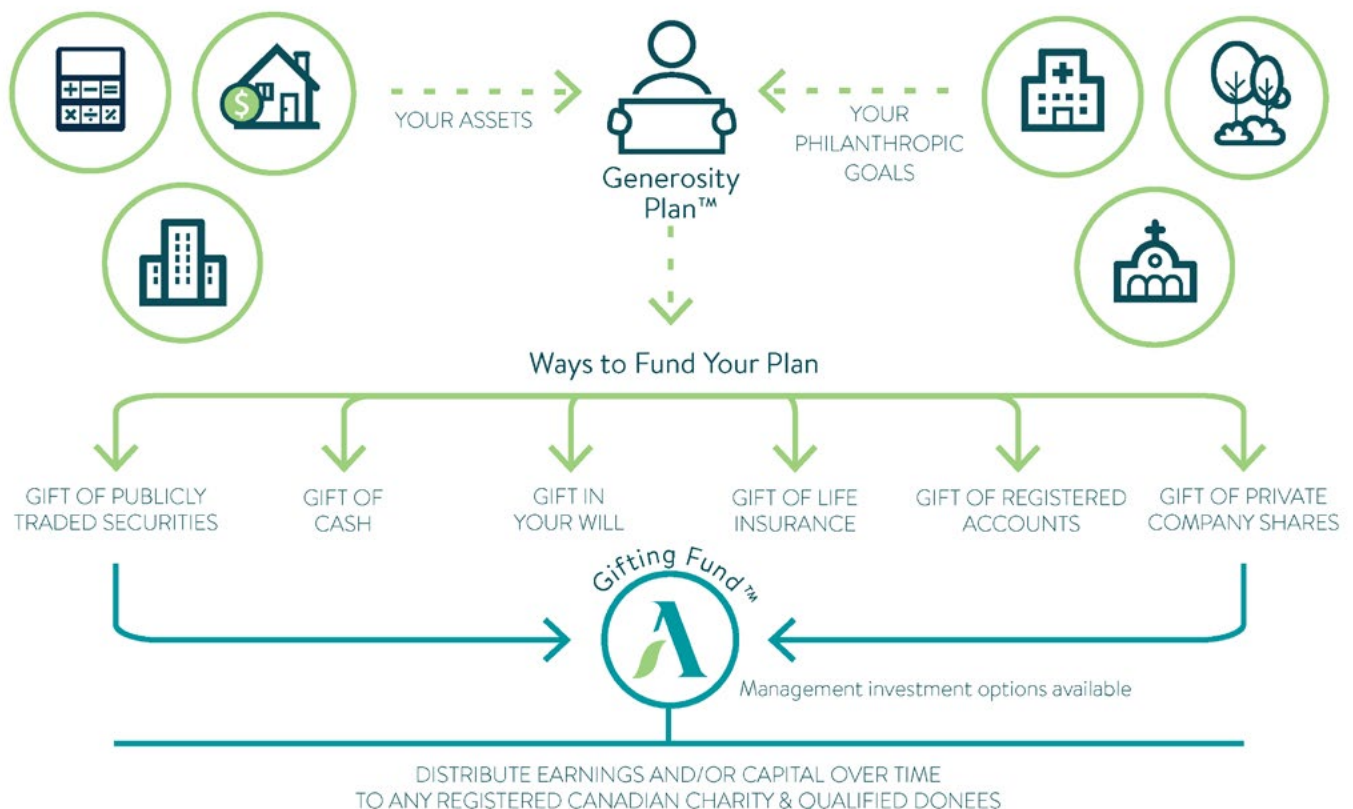


## Charitable Giving Doesn't Happen Without a Plan

Plans help us to focus on what we want to accomplish and why, how we're going to get there, and what markers we'll create to make sure we stay on the right track. Charitable giving can often get lost among the demands of day-to-day life or be put off for a more convenient time. Reaching our charitable goals won't just happen on its own. We need to intentionally incorporate generosity into our overall planning.

Abundance Canada can help you create and implement a customized Generosity Plan™ that aligns with your philanthropic goals. It maps out the best strategic options for giving today, tomorrow and well into the future, while leaving enough flexibility to adapt to changing circumstances and explore new opportunities along the way.

## Creating a Generosity Plan™



# The Benefits of a Generosity Plan™:

- + Many ways to donate
  - + Abundance Canada has significant experience with all gift planning options.
  - + The type of asset and timing of the donation allow you to be strategic and tax efficient.
- + Donated capital can be distributed, with no locking in requirement
  - + Allows you to match the donation receipt with a taxable event and defer making distribution decisions
  - + Provide sustainable support for charity over an extended period
  - + Accumulate a balance for a future project
    - + Capital campaign not yet launched
- + Donor Advised
  - + You provide recommendations to Abundance Canada
    - + which charities/qualified donees should receive support
    - + how much support each should receive
    - + the time period over which they receive that support
    - + whether the charity/qualified donee be notified of the source of the support
    - + whether the donation be made anonymously
- + Incorporate other people in your Generosity Plan
  - + Multi-generational
  - + Alternative to a private foundation
- + Investment management options available for long-term Generosity Plans
  - + Read about our responsible investment guidelines
- + Receive an annual statement showing all activity in your Generosity Plan
- + Ability to adjust your plan as circumstances change

## Next Steps

Established in 1974, Abundance Canada envisions a world where everyone lives generously, because we believe *generosity changes everything™*. To learn more about creating your Generosity Plan, contact Abundance Canada at **1.800.772.3257** to speak with a gift planning consultant. All consultations are confidential, with no obligations.



[abundance.ca](http://abundance.ca) | [1.800.772.3257](tel:18007723257) | [generosity@abundance.ca](mailto:generosity@abundance.ca)