

# NANAIMO FOUNDATION

## Lunch & Learn



TALKING ABOUT CHARITABLE GIVING WITH YOUR CLIENTS

## The CHARITABLE GIVING CONVERSATION Lunch & Learn

*Presented by the Nanaimo Foundation*

**With 84% of Canadians contributing to charity on an annual basis, charitable giving is an important part of your clients' overall financial plan.**

As neutral experts on a range of planned giving options, and with a deep understanding of community issues, the Nanaimo Foundation serves as the vehicle for giving many advisors seek for their clients.

### Lunch & Learn

**45 minute presentation with catered lunch brought to your office**

- Why discuss charitable giving in Canada's philanthropic landscape.
- What is the Nanaimo Foundation.
- Multiplying the impact of donations with the community foundation model.
- Providing stability and flexibility to donors and clients.
- Tools for giving with the Nanaimo Foundation.
- Initiating the charitable giving conversation with clients.

## Recommending charity without recommending a *cause* through your local community foundation

The Nanaimo Foundation supports all areas of our community. We take the broadest view of what a community is and what it needs to succeed. We are not tied to one single sector or one issue area.

Helping clients realize their philanthropic goals and ideas provides an opportunity for professional advisors to do what they do best: identify creative solutions that help their clients solve problems and achieve specific objectives.



[www.nanaimofoundation.com](http://www.nanaimofoundation.com)

## Partners in Philanthropy

Many professional advisors serve as our Partners in Philanthropy in improving our community. They advance philanthropy and encourage charitable giving for lasting impact.

Professional advisors—wills and estate lawyers, bankers, trust officers, financial planners, accountants and life insurance professionals—play an important role in the success of the Nanaimo Foundation.

Our Partners in Philanthropy are recognized for their support and added to our referral list for donors.

Access the Community Foundations of Canada **Professional Advisor Toolkit** on our website [www.nanaimofoundation.com](http://www.nanaimofoundation.com)

**To book a Lunch & Learn, or for more information, contact**

Laurie Bienert  
Executive Director  
250-667-4292  
[laurie@nanaimofoundation.com](mailto:laurie@nanaimofoundation.com)