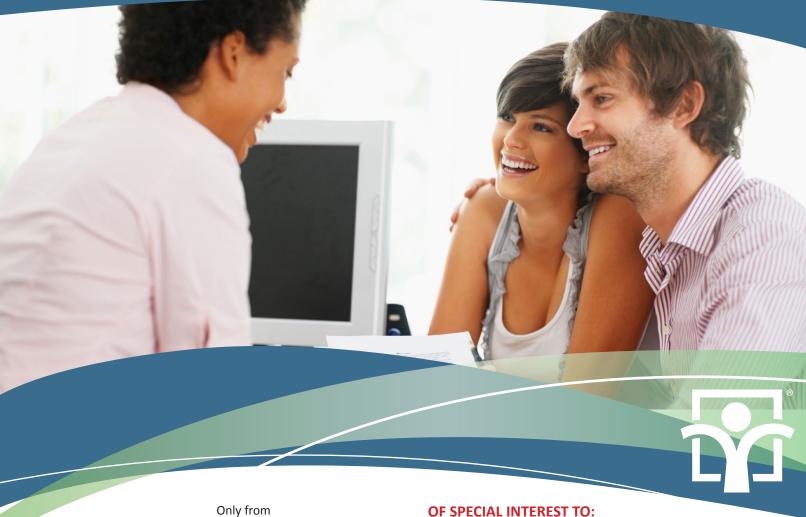
Investment Strategies in Charitable Giving



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INVESTMENT STRATEGIES IN CHARITABLE GIVING

Canadians are becoming more philanthropic; giving more every year to causes that are important to them, but there is today a major change in the world of philanthropy—people want to be in control of how they give. They are holding the organizations accountable for the money and want to see how it is managed. They're becoming far more demanding in wanting to maximize the impact of their donations. This course is to assist financial advisors who want to ensure their clients' gifts complement their overall wealth management strategy in a tax-effective manner.

CONTENT DESCRIPTION & KEY CONCEPTS

Learn how to integrate charitable giving strategies into your annual financial reviews • Learn how to use charitable giving as a way to build your business • Help clients to give in the most a tax efficient way • Help clients to decide whether they want to give directly, start their own charity, give through an endowment, or use donor-advised funds • Determine which financial tools and techniques are appropriate for certain client situations • Understand your role in terms of your clients' charitable giving

CERTIFIED SKILLSETS YOU WILL LEARN

Using case studies and exams, students will learn to convey the process behind some of the most powerful gift planning concepts used by financial advisors to maximize charitable gifts while minimizing taxes for clients:

- Learn the different benefits for donors of different gift types and determine which are most appropriate for your clients.
- Understand the main components of charity law and taxes that can
- affect gift plans.
- Complete the case studies to test your new skills in defining gift plans for clients using charitable bequests, gifts of securities, gifts of life insurance, donor advised funds, real estate and other gifts.
- Familiarize yourself with the potential pitfalls of charitable giving including how to look out for those tax shelter schemes not acceptable to CRA.
- Discover how to find resources to assist you in the development of a client's gift plan.

COURSE COMPONENTS

MULTI MEDIA INTRODUCTION – Your virtual instructor overviews key concepts in each chapter.

KNOWLEDGE JOURNAL TEXTBOOK – A full course manual containing detailed study materials, chapter by chapter.

EVERGREEN EXPLANATORY NOTES – A comprehensive reference library.

PRACTICE MANAGEMENT THESIS – Your formal case study online: a great review before your final exam.

TESTING – Chapters end with multiple-choice quizzes and true-to-life cases. A comprehensive final exam is written at the end of your studies.

ACCREDITATION - Earn 30 CE/CPD credits per course.

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- 2 Charitable Gifts and Taxes
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- 9 Other Gifts
- 10 Integrating Philanthropy into Your Practice

Study Time: 30 hours

Card Number

Name on Card

Signature

STEP 1: STUDENT IDENTIFICATION

Name	Returning Student ID #
Company	
Address	
City	Province
Postal Code	Email
Phone with Area Code	Fax
Referred By	Current Designations/Licensing

STEP 2: TUITION FEES	
☐ Single Course Tuition Fee	\$795
☐ Electronic Textbooks	No Extra Charge
☐ Hard Copy Textbooks and Delivery	\$ 85
OR	
☐ Choose Certified Skills Diploma or Designat	tion Program and

See www.knowledgebureau.com for tuition funding options and details on qualifying for tax credits.

save up to 31%

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	Hard Copy and Delivery (see step 2)	\$	c			
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Unless box is checked, I provide consent for you to store my contact information and inform me of my progress and future educational opportunities.