

What I Heard

What Was Said

Possible Actions

I want to infuse social purpose into my investments. How do I do this?

I want my investments to align with my values. What are the ways that you help me evaluate and align my investments?

Ask questions around what is motivating investments and what drives core decision making. There are a number of impact investments that out-perform the market.

Resources: Social Venture Exchange, Capital for Cause, SheEO

I am about to retire and I want to make sure that my charitable contributions can be maintained at the same or greater level?

Will I have enough money to do everything that I want to do?

I participate in a number of functions in the community that are tied to my philanthropy, will I still be able to do these things?

Walk your client through what their "number" is to reassure them. Layout the investment strategy that showcases how their charitable contributions can be secured.

Products/Frameworks: Insurance, Corporate structures

Resources: K&C website

I am about to sell my company and I know that my kids won't need 100% of the sale. How best should I manage this new-found wealth?

How much is enough for my family?

I need to share with my family how our wealth position is changing, what do I need to share? How do I share it?

Family meeting to share new wealth position. Set up different corporate structures to protect assets and manage taxes.

Products: Donor Advised Fund, Private Foundation, Insurance, Impact Investments

Resources: K&C website

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I recently received an inheritance. Is there a way to manage these funds?

I have unexpected funds that can be used in a number of ways, how do I make decisions about this wealth?

Walk your client through what his/her "number" is. Layout different investment options. Have conversation about the importance of social capital management.

Products: Donor Advised Funds, Private Foundations, Impact Investments

Resources: K&C website

I have heard about Donor Advised Funds, are these right for me?

I want to start planning my philanthropic giving more strategically. Do I need a special account to do this?

Share the different philanthropy tools that are available. Explain how funds, once deposited into a giving account are restricted to charitable purposes.

Resources: K&C website

I want to keep cash on hand for one-time donations, but also make sure I have funds set aside for larger and longer-term contributions. Is there a way to do both?

I don't want to be restricted in doing good things in the community. If I put funds into my foundation will I be restricted from doing "cool things?" Will my kids be restricted if they want to do something different from me?

Explain that certain philanthropic accounts have more flexibility than others. There are also options to align investments with social objectives that might not only do good in the world but also generate a return.

Resources: SVX, K&C website

What I Heard

My kids don't fully understand the size of our wealth, how can I help them gain this knowledge?

How do I protect my family's privacy if we have a family foundation?

What Was Said

I don't know where to start in talking to my kids about our wealth. I am unsure about how to do proper succession planning. I don't feel confident in my own financial literacy to explain to my kids our family's net-worth. I want to model a set of values, but I am not sure how to do it right.

Possible Actions

Walk through a potential family meeting agenda where you can provide some tools and resources for all family members.

Resources: AFP Donor Bill of Rights; Books by James Hughes; Books by Jim Grubman; contact your preferred Family Enterprise Advisor

Have you heard about the Giving Pledge? I think my family should be part of this. Can you help set this up?

I want to allocate a portion of my wealth for a legacy gift and to highlight my philanthropy today.

Have a conversation about values and long-term vision. Explore an investment strategy that generates a return to cover the costs of that vision.

Resources: Philanthropic Foundations Canada, Women Moving Millions

I want my company to do more for the community. Is there a way to do this beyond just writing a cheque?

I know my business can be doing more and can grow if I properly engaged other aspects of social capital management. What are they and how can I learn more?

Walk your clients through an ESG framework – procurement policies, HR standards, governance structures, etc.

Resources: BCorp website, BCorp 101 whitepaper on K&C website