



SourceGroup

Strategy + Development + Training = Results

Living Gifts

For People Who Want to Give and Receive Something Special

The traditional way to give is by way of a Will. Times are changing, and there are now many more options. It is estimated that by 2015 over 50% of gifts to charity will be through estate planning and Living Gifts.

Today, the Baby Boomer generation prefers the interactive Living Gifts approach long practiced by savvy philanthropists. The next step is to plan for Generation X.

Living Gifts' prime focus is meeting the needs of both the Donor and his/her Charity of choice over the donor's lifetime.

Living Gifts takes creative planning to the level of interactive participation between the living donor and the Charity:

- Living Gifts provide significant tax benefits that can be achieved through a customized Living Gifts program.
- Changing tax laws have made it much more favourable for the donor to give now with:
 - Traditional wills
 - Insurance and Annuities
 - Gifts of Property
 - Gifts of securities
 - Trusts and Foundations
 - Endowment gifts
- Decisions can be made to protect the integrity of the donor's estate
 - The donor's family can be involved in the estate planning process, thus eliminating family challenges
 - the donor can negotiate arrangements with the Charity that meet the needs of both parties
 - Donor recognition programs can be customized to the interest to the benefactor while they are alive and well.
- Living Gifts encourage relationship building for a Charity to have a plan to move forward with the potential donor. The Charity should:
 - identify them
 - have a plan to develop their interest and involvement
 - cultivate them
 - provide a professional team to answer questions and resolve issues
 - build their trust and interest through personal involvement

SourceGroup is experienced and can assist your planning process.