

Charitable Gifting Presentation



The McIntosh Wealth Advisory Group & The Al Azhar Investment Committee Presents:

AN INTRODUCTION TO THE AWESOME POWER OF PLANNED GIVING

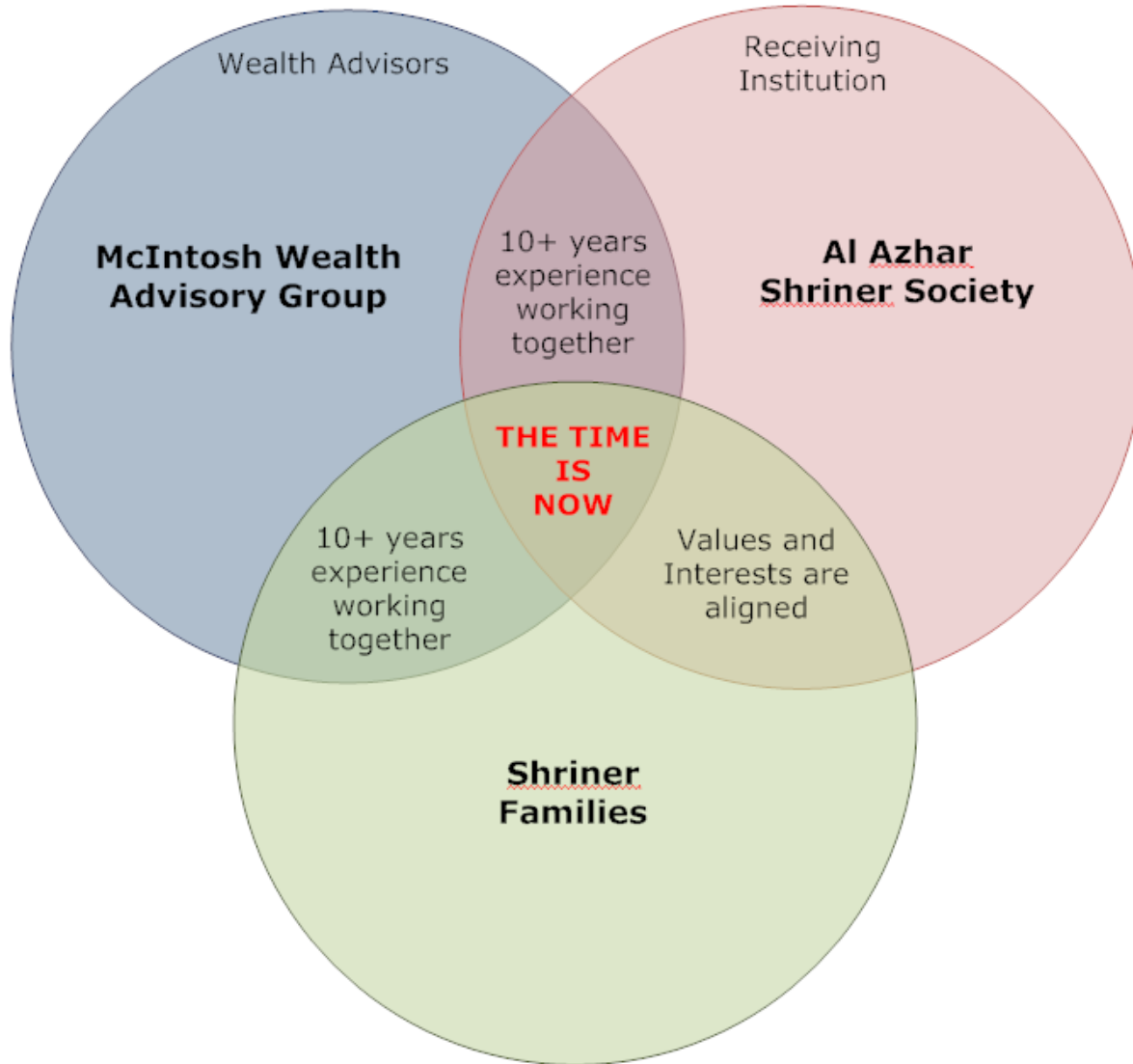
3rd Quarter 2011

Overview

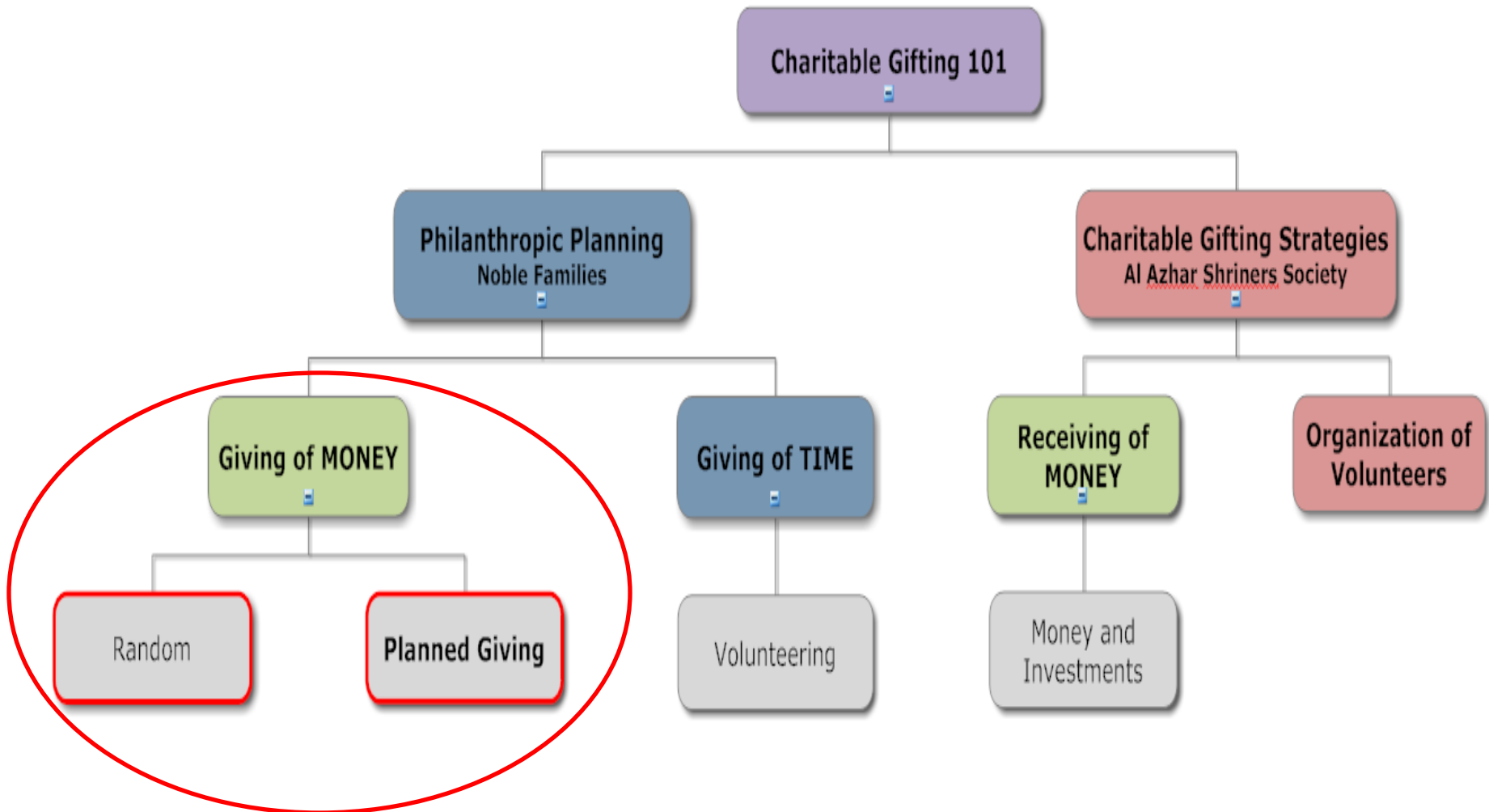
- Background
- Charitable Gifting 101
- Planned Giving
- Donation Example \$5,000
- Integrated Charitable Gifting
- Customized Charitable Gifting
- Conclusion

Background

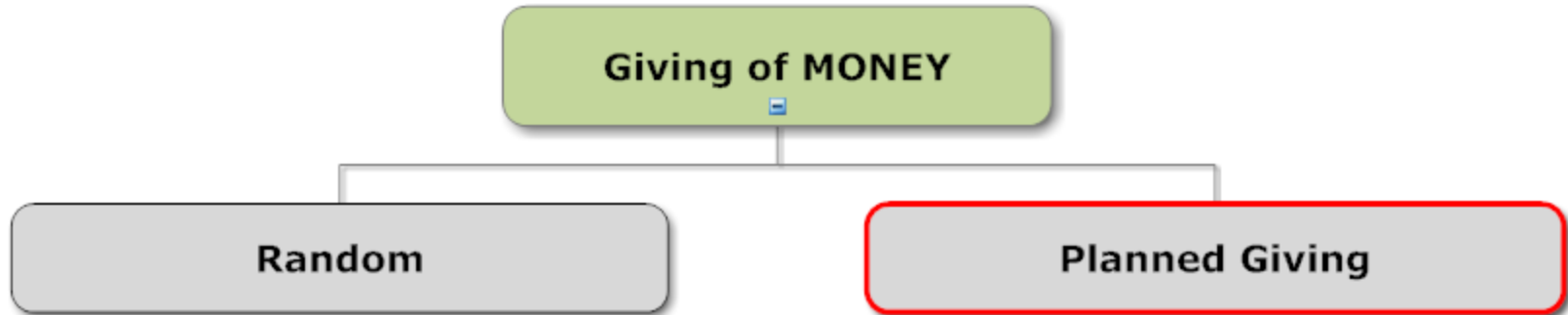
Wealth Advisory = Investment Consulting + Advanced Planning + Relationship Management



Charitable Gifting 101



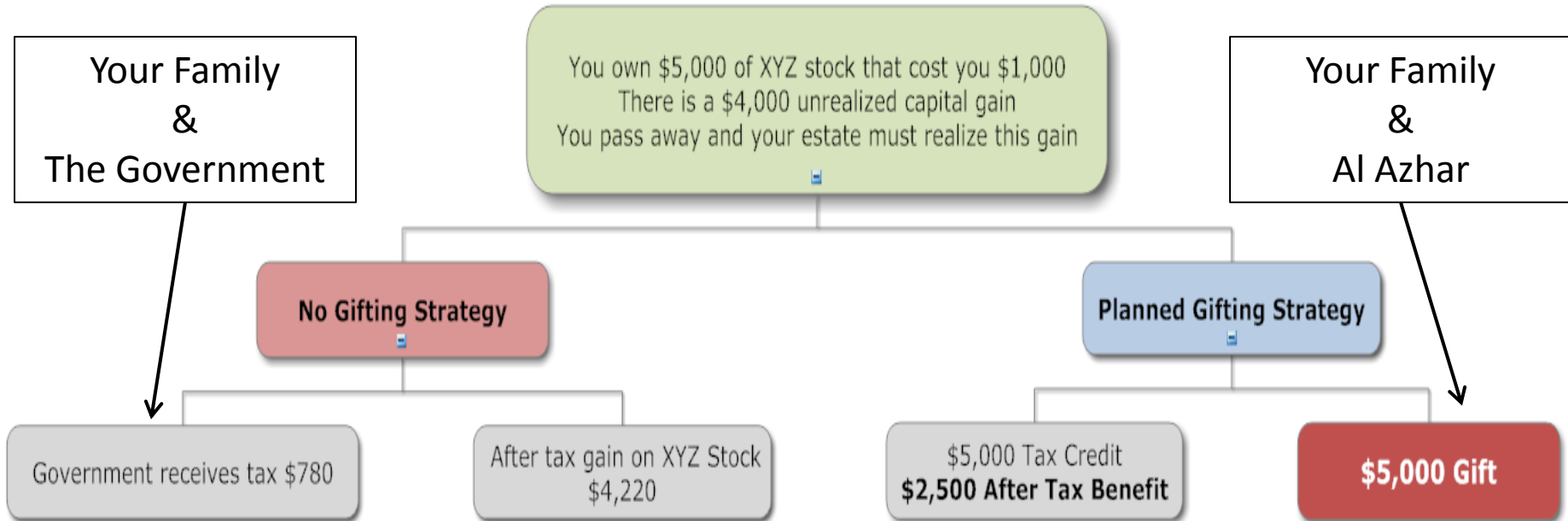
Planned Giving



- 1) Charitable intent is usually determined by **emotion**
- 2) Donations are typically **smaller** in size and **random** in delivery
- 3) Donations are funded by **cash** or even on your **credit card**
- 4) Donation amounts are usually **suggested by the receiving institution**
- 5) The charitable event usually feels more like a **sales experience**

- 1) Charitable intent is pre-determined through **family planning**
- 2) Donations are typically **larger** in size and **organized** in delivery
- 3) Donations are funded with many options and based on **tax efficiency**
- 4) Donation amounts are suggested by your **advisors and family strategy**
- 5) The charitable event being part of a greater strategy feels **magnified**

Donation Example \$5,000



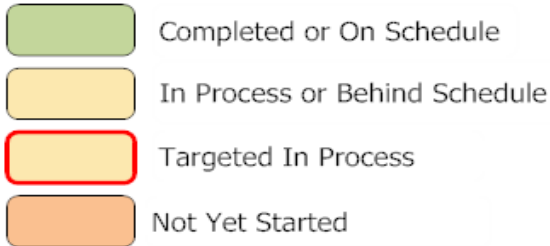
Canada 



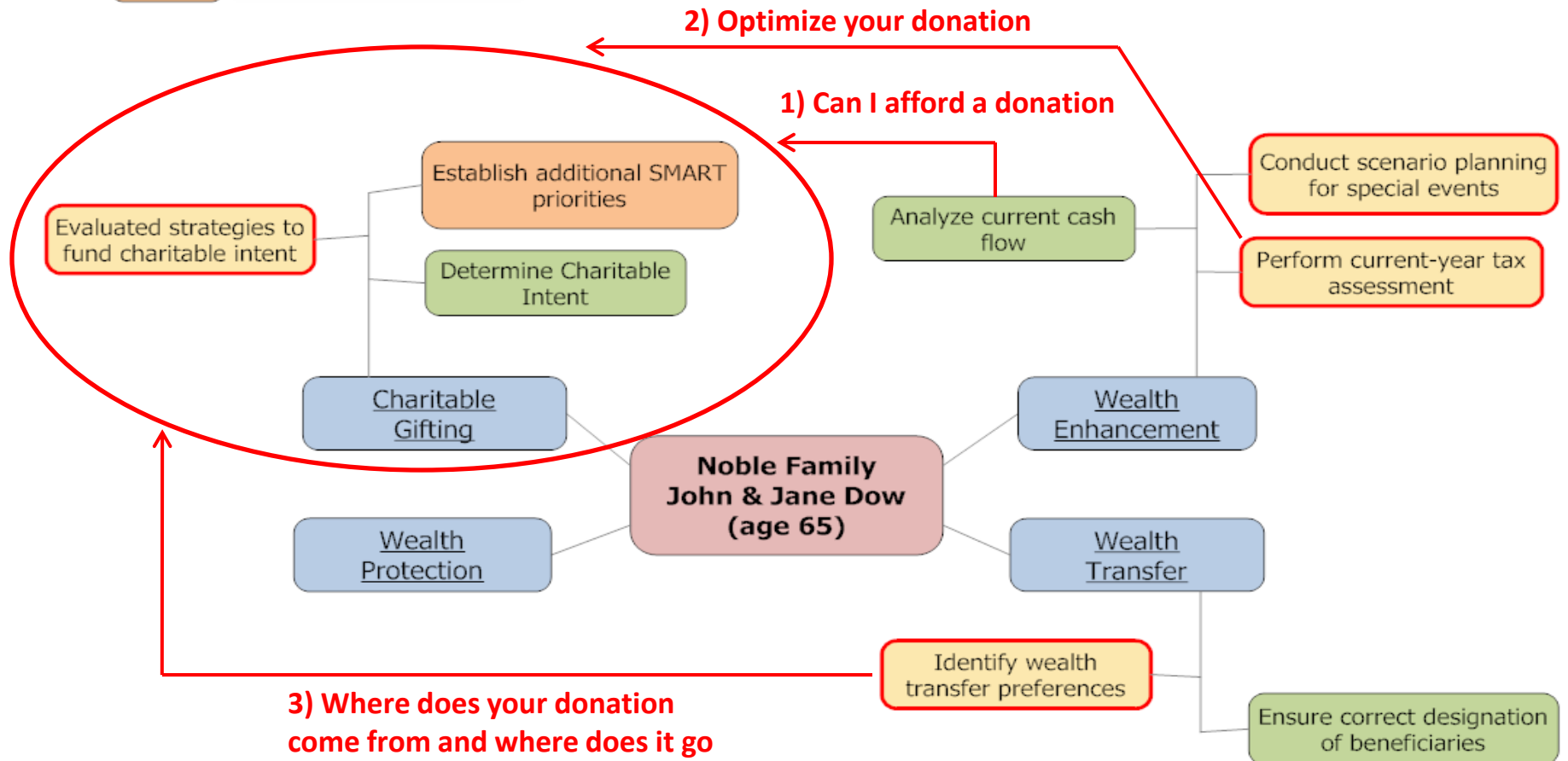
Your estate can use this tax credit to off-set other gains

Integrated Charitable Gifting

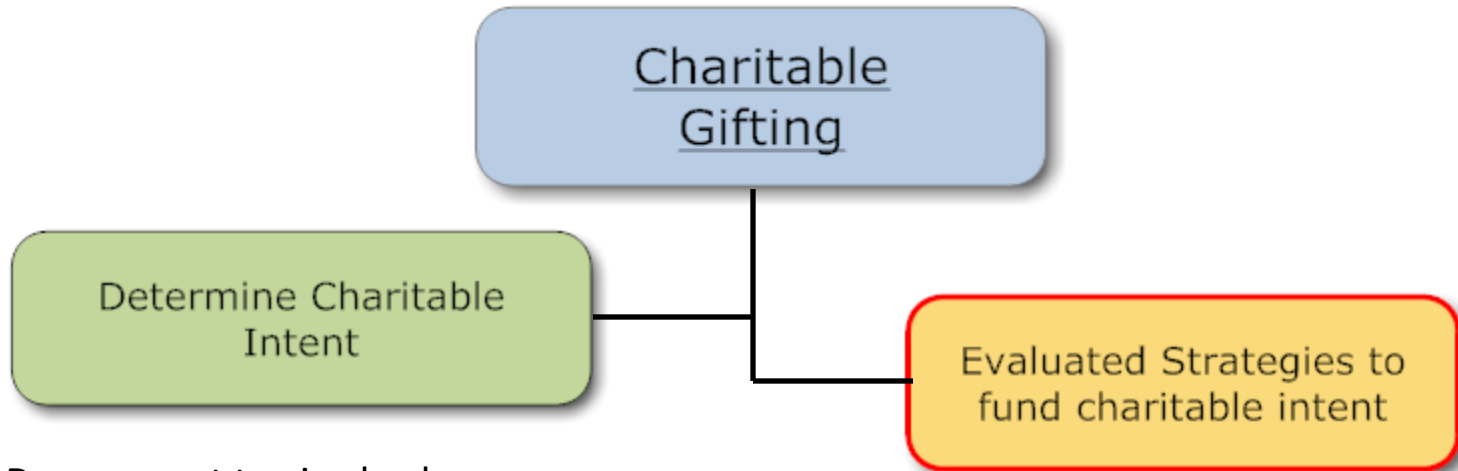
Advanced Planning = Charitable Gifting + Wealth Enhancement + Wealth Transfer + Wealth Protection



SMART Priorities are:
Specific, Measurable, Attainable, Result-oriented, Time-bound



Customized Charitable Gifting



- 1) Do you want to give back
- 2) Where do you want to make a difference
- 3) How much time and/or money do you want to give as your ideal target

- 1) Analyse your current cash needs
- 2) Perform a current-year tax assessment
- 3) Determine your optimal gift amount
- 4) Evaluate alternative sources for funding
- 5) Compare back to your ideal target
- 6) Evaluate results and repeat

Conclusion

- We are all fortunate to be associated with the ``Worlds Greatest Philanthropy``
Shriners Hospitals for Children
- Philanthropy feels good and makes a difference in peoples lives
- Planned Gifting increases your chances of making a difference, it maximizes your after-tax dollar benefit and dramatically increasing the positive social impact to your community
- There is expertise willing to educate and assist you with charitable gifting strategies and philanthropy within the **Al Azhar Shriners Society**

Bob and Garth McIntosh

www.McIntoshWealthAdvisoryGroup.com

mcintosh@integralwealth.com

403-261-8877

#1510, 555 – 4th Ave SW

Calgary, AB



INTEGRAL

IIROC Member

The McIntosh Wealth Advisory Group are fully securities licensed registered representatives of Integral Wealth Securities Limited

www.integralwealth.com

CIPIF

Canadian Investor Protection Fund

MEMBER