

Future Giving

is all about planning

by Community Foundation North Okanagan



Sattu Mahapatra, an advisor with IG Wealth Management in Vernon describes conversations with clients that surround charitable giving as a “no brainer approach”.

“After reviewing tax efficient investments & cash flow options in retirement planning, you have a clear picture of how much money you can give to charity while still achieving your other goals.” Sattu says, “It’s not about thinking I have enough so I can probably make a donation. It’s about knowing you have a plan that works and that you can give this amount. And it’s a tax benefit!”

We often hear that to achieve a goal we must start with a plan. If you’ve spoken with a financial advisor lately, they are probably saying the same thing about retirement plans.

The Community Foundation North Okanagan (CFNO) has worked alongside many local financial advisors to assist in establishing their clients’ charitable giving plans. Some of our donors have established giving plans that allow them to make donations throughout different stages of their life as a way to take advantage of tax savings, but also so they can see a cause close to their heart receive the benefit. Many other donors are able to make the most impact by creating their future giving plan through a gift in their will or by naming the CFNO as the beneficiary of their life insurance policy.

When it comes to philanthropy, many local financial advisors are recommending the Community Foundation North Okanagan because we offer a flexible yet structured approach to charitable giving. We provide investment vehicles and community expertise to help you make informed decisions. We also offer options for you to support a wide variety of social, cultural, educational, and environmental needs surrounding issue areas that are specific to our North Okanagan region.

The Community Foundation has been leading

Whether your plan is to give now, or to give later, establishing a future giving plan ensures that the legacy you wish to create is realized.



the **Vital Signs** program in our region, to compile and track local data over time. This report allows us to measure the vitality of our North Okanagan communities and provides critical data for us to convene community-led organizations and inspire action around our most critical local issues.

"We have a growing population, close to 90,000 citizens in the North Okanagan region. As more people call this area home it becomes important for us to understand how individuals and families are being affected by the increased rental & housing costs and the changing economy & aging workforce." Leanne Hammond, Executive Director, CFNO, says "We know the organizations representing a large variety of causes in our region and we can introduce you to the programs and initiatives they are working on."

The Vital Signs report also serves as a starting point to engage in meaningful conversation

surrounding your giving interests. We can offer advice and help whether you have a personal charitable vision or if you would like to support an emerging community issue area.

The Power of Many

When you establish a fund or make a donation with the Community Foundation North Okanagan your money is pooled with our **\$18 million endowment fund**. You become part of a circle of giving, where every dollar granted to a charity, is because many people just like you - cared.

Regardless of your age or the size of your gift, we are here to make your **giving experience simple and rewarding**.

To find out more call Leanne Hammond today at 250-542-8655 or email leanne@cfno.org.
www.cfno.org



**COMMUNITY
FOUNDATION**
north okanagan

**Create lasting legacy
with a future giving plan.**



Leanne Hammond,
Executive Director

Mike Nolan,
Board Chair

Make the most of your giving. Contact Leanne today.
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