

BRINGING YOU THE OPTIMUM PHILANTHROPIC GIVING EXPERIENCE.

Canaccord Wealth Management recognizes the value of incorporating strategic giving into our clients' wealth management plans. To facilitate this, we've partnered with Benefaction Foundation—a charity dedicated to providing professional, comprehensive support to help our clients accomplish their philanthropic ambitions in a tax-smart manner.

Registered as a charitable Public Foundation with the Canada Revenue Agency (CRA), Benefaction is committed to ensuring that your fund meets all annual CRA disbursement quota obligations. Benefaction is authorized to receive philanthropic donations, issue tax receipts and bequeath gifts to registered charities through vehicles such as donor-advised funds, direct funds, and endowments.

Together, we'll help you establish a personalized strategy that includes:

- Opportunities for tax-efficient giving.
- A focus on the causes that matter most to you.
- Expert charity evaluation and measurable feedback.
- Integration with your overall wealth and estate plans.

For more information about how the Complete Canaccord Philanthropic Solutions program can serve you, please contact your Investment Advisor.

CRA# 80421 3759 RR0001

Donations are irrevocable and no personal benefit can be received by the donor or his/her family, directly or indirectly. All gifts donated are the property of Benefaction, and grants made from its funds are made by Benefaction. Donors and designated advisors may make recommendations to the Board of Directors about the grants to registered charities and other qualified donees. In practice, donor/advisor recommendations that are consistent with the terms of Benefaction's Investment Policy, Benefaction's Gift Acceptance Policy and the laws of Canada are approved.

i All grants require the approval of Benefaction's Board of Directors. The minimum grant to a registered charity is \$1,000.

ii Past performance is not a guide for what might happen in the future. The value of investments and the income from them can go down as well as up, so your charity may receive less than you donated.

BENEFACTION

HAVING THE MEANS TO LIVE WELL IS IMPORTANT.

MAKING A MEANINGFUL DIFFERENCE IS LIFE-CHANGING.

You've worked closely with your Advisor to reach your personal investment goals. Now, we can help you achieve your dream of making a difference.

Whether you wish to support the arts, conserve natural resources, advance medical research, or help the world's underprivileged children, giving back speaks volumes about who you are and the values you hold dear.

Canaccord Wealth Management can help ensure your gift complements your overall wealth management strategy and supports your cause in a way that is effective and lasting. It's a simple, smart, and tax-effective way to help you realize this ideal.



Complete Canaccord

Complete Canaccord is our customized approach to helping you reach your specific financial goals. One comprehensive process encompasses all your wealth management and financial planning needs. It enables you to incorporate all aspects of your finances into one cohesive plan — the Complete Canaccord Wealth Strategy. By doing so, you and your Advisor can better evaluate ways to ensure you benefit most from your financial decisions, and discuss even more alternatives to help you meet your financial objectives.

www.canaccord.com

MEMBER OF ALL CANADIAN STOCK EXCHANGES
OFFICES IN MAJOR CENTRES ACROSS CANADA

Canaccord Wealth Management is a division of Canaccord Genuity Corp., a Member of the Canadian Investor Protection Fund and the Investment Industry Regulatory Organization of Canada.

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YOUR GENEROSITY. OUR COMMITMENT.



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At Canaccord preserving personal wealth for future generations and charitable causes is very important. Complete Canaccord Philanthropic Solutions provides individuals and families who wish to provide on-going charitable support with a nameable charitable fund. As part of your overall estate planning, your charitable fund allows your legacy to live on, while also providing you with tax advantages.

IT'S LIKE HAVING YOUR OWN CHARITABLE FOUNDATION

Complete Canaccord Philanthropic Solutions delivers fully customized giving programs designed to complement your wealth management strategy and the values you hold dear. When you work with your Investment Advisor to establish a charitable giving program, you will be rewarded with:

- **Tax savings.** You'll receive a tax receipt when you donate cash or publicly-listed securities. Plus, when you donate securities, the tax liability typically associated with the realization of accrued capital gains may be avoided.
- **Efficiency.** Achieve all the financial advantages and personal satisfaction that comes with establishing your own charitable foundation, with significantly less cost and complexity.
- **Control.** You advise on how you would like your donation to be used. We'll make sure you get regular, measurable feedback on the positive impact of your gift.
- **Legacy.** Create lasting change by adding to your fund. Place a bequest in your Will, donate an RRSP or RRIF, transfer a paid-up life insurance policy, or invite family, friends and colleagues to get involved in your cause.

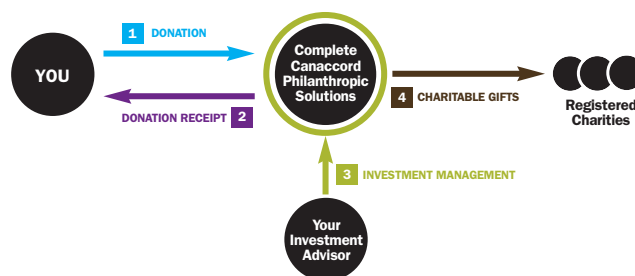
The Complete Canaccord Philanthropic Solutions program takes care of all the details by:

- Issuing tax receipts.
- Distributing grants to your chosen charities.
- Managing the administration of your fund.
- Reporting on how your donations are put to use.

HOW IT WORKS

Whether you intend to donate to a registered charity, a qualified cause, or one of the Canaccord Philanthropic Solutions portfolios we must first help you establish a Donor Advised Fund (DAF). Here's how to get started:

- 1** You enter into a donor agreement for your fund, choose a name for it, and seed it with a minimum \$25,000 donation of cash or securities. In the future, you and others can add additional donations.
- 2** You receive a tax receipt for your donation.
- 3** Your donation is invested in a separate account under the guidance of your Investment Advisor, and a certain portion is allocated for charitable purposes each year.
- 4** You make recommendations on which charities or causes you wish to supportⁱ.



The investment and donation split

In the Complete Canaccord Philanthropic Solutions program up to 10% of your initial donation will be specified as a direct charitable gift, and the remainder is invested. Canada Revenue Agency requires at least 3.5% of the invested portion to be dispersed annually for charitable purposes. This leaves most of your investment intact and able to continue growingⁱⁱ.

GIVE YOUR OWN WAY

Complete Canaccord Philanthropic Solutions offers you two ways to give. You can establish a Donor Advised Fund or support your cause through a Direct Fund.

- **Donor Advised Funds** are flexible, cost-effective charitable giving vehicles tailored to reflect your personal philanthropic goals. With the guidance of your Investment Advisor, you advise how your funds are invested and to which causes donations will be made over the long term.
- **Direct Funds** enable you to donate quickly. With your Investment Advisor's assistance, you can make a direct-to-recipient gift of securities. This can significantly enhance the tax advantages of charitable giving in comparison to gifts of cash.

CREATE CHANGE WHERE YOU WANT IT

We offer three avenues to help you initiate change. You can name a charity you choose to support, contribute to one of our Charity Portfolios, or should you need further guidance in choosing charities that reflect your goals, we can arrange for you to work with a professional philanthropic consultant. Complete Canaccord Philanthropic Solutions portfolios are thoughtfully-constructed charitable portfolios that allow you to pool your donations with like-minded donors, potentially creating an even greater impact. Choose from:

- Aging, Elder Care and Alzheimer's Portfolio
- Children and Education Portfolio
- Environment Portfolio
- International Portfolio