



PROMISE

past, present, and the possible ——— 2022/2023

Curtis Kimpton:
That Unbelievable
Feeling of

Giving Back

Gene Pidwerbesky's
Harvest Gift for
Children's Health

MNP Partners Give
Together for the
Good of the Province

Being Harry Koehn:
the Legacy of an
Exemplary Canadian





**“It’s really important to give back to
the community that you live in.”**

– Fundholders Linda and Arnie Shaw

Create your Saskatoon Legacy.

saskatooncommunityfoundation.ca/giving | 306.665.1766



Table of Contents

Message from the Board Chair and CEO	3	Nutrien Saskatoon Community Foundation Walk with the Wind Gala	12
Gene Pidwerbesky’s Harvest Gift for Children’s Health	4		
Curtis Kimpton: That Unbelievable Feeling of Giving Back	6	Being Harry Koehn: the Legacy of An Exemplary Canadian	16
MNP Partners Give Together for the Good of the Province	8	Meet our Will Power Partners	18
How Saskatoon Community Foundation Works	11	Becoming an Accidental Philanthropist	19

Message from the Board Chair and CEO

We are inspired by your brilliant gifts and the many ways you empower and illuminate our community!

Thank you for trusting Saskatoon Community Foundation to bring your legacy to life. What an incredible gift to be trusted by hundreds of donors and fundholders to direct their charitable investments to the hands doing important work serving the community.

In these pages you will read the stories of the inspiring folks who have given of themselves as philanthropists and change-makers to create a bright, vibrant future.

- In the story of **Gene Pidwerbesky** and his family, you will read about their heart-warming harvest gift that will certainly inspire future generosity from the farming community.
- In our feature on the **MNP Community Fund**, you will learn how the collective individual gifts of their partnership group has become \$1 million for charities around the province.
- And you can join us in reflecting on **Harry Koehn's life and legacy** as an exemplary Canadian who wanted every person to have a chance to chase their dream.

Enjoy our photo diary celebrating the cultural advisors, artists, volunteers, and sponsors who contributed to the **Nutrien Saskatoon Community Foundation Walk with the Wind Gala** experience, the final gala in support of the **Community Fund for Reconciliation!** ●

As past board chair and fundholder Curtis Kimpton says, "if you do something for one person every day, you will change the world."

Danielle Favreau, CPA, CA, Board Chair
Carm Michalenko, BComm, MBA, Chief Executive Officer



Photo: Dave Stobbe

Board Chair **Danielle Favreau** and CEO **Carm Michalenko**

Our Vision: A vibrant community where everyone belongs.

Gene Pidwerbesky's Harvest Gift for Children's Health

*The Pidwerbesky family gathered at Saskatoon's Park Town Hotel on a hot August day to make an announcement to a crowd of news media. They were excited to share the news that Gene Pidwerbesky had decided to make a **\$1.98 million donation** to Jim Pattison Children's Hospital Foundation.*

Gene Pidwerbesky runs a successful multi-generational family farm in the Borden area. Being in the spotlight for a major charitable gift was new ground for him, but he was certain that a public announcement of his gift was the right course of action. The grain farmer was determined to leverage his gift to make the most of it and inspire other farm families to do the same.

It was the last day of harvest in the fall of 2021 when Gene sustained a serious injury in an accident on the farm. He was hospitalized in Saskatoon for months of treatment. As he recovered, he began to plan his donation.

Gene's gift provides better medical care for thousands of children across the province.

In designating his gift, Gene wanted to fill a void for children's medical care that was not otherwise addressed through public funding from the province. For the farmer who had spent hours on heavy farm equipment working the land, an equipment purchase for Jim Pattison Children's Hospital—that serves all of the province's children—was perfect.

"Kids...need to live the life they deserve to the fullest, and that's what this gift is about," said Gene. "Kids don't know what is happening to them or why. Being in hospital is hard enough for an adult, but these kids are hurting, and need the best options available. There are various great places these funds can go, but these kids deserve it the most."

The Pidwerbesky family's gift to the kids' hospital promises to inspire future gifts. It sparked Jim Pattison Children's Hospital Foundation's provincial fundraising campaign "Harvest for Kids' Health," appealing to other farm families to consider charitable giving at harvest time.

The Pidwerbesky family wants to inspire future gifts from the farming community.

A permanent dedication to Gene and his family is now located in the highly visible “Moose Pod,” within the busy Pediatric Outpatients unit, which serves over 25,000 patients annually*, nearly half from outside Saskatoon.

“It has been an honour to assist Gene Pidwerbesky in the making of this meaningful gift,” said Carm Michalenko, Saskatoon Community Foundation CEO. “We know that the Pidwerbesky family’s generosity will inspire more families to make charitable gifts for important causes they are passionate about. Working with Mr. Pidwerbesky, his professional advisors, and Jim Pattison Children’s Hospital Foundation is a wonderful example of the power of charitable giving through a partnership with Saskatoon Community Foundation.”

“Thanks to the life-changing contribution of Gene Pidwerbesky and his family, this tremendous gift will provide access to urgently needed specialized equipment at Saskatchewan’s Jim Pattison Children’s Hospital,” said Brynn Boback-Lane, President and CEO of Jim Pattison Children’s Hospital Foundation. “A ‘harvest’ heartfelt thank you to Gene and his family for this commitment to the mothers who give new life and the children who deserve to live their very best. In true Saskatchewan spirit, this donation is a testament of how you can help your neighbours, friends, and families when they most need it.

“Partnership with Saskatoon Community Foundation demonstrates that local community organizations can do their good work together and have a positive impact in the lives of others.” ●

* Source: Saskatchewan Health Authority, reporting period April 1, 2020-March 31, 2021.



1 & 2 Gene Pidwerbesky and the Pidwerbesky farm

3 Gene Pidwerbesky with his daughters and their families, Jim Pattison Children's Hospital Foundation CEO Brynn Boback-Lane and Board Chair Dr. Laurentiu Givelichian, photo by Jim Pattison Children's Hospital Foundation.

Curtis Kimpton: That Unbelievable Feeling of Giving Back

In 2022, Saskatoon Community Foundation says farewell to past board chair and fundholder Curtis Kimpton, after 10 years of leadership.

Curtis is highly regarded in the community as a champion who can create momentum and get things done. He has been involved with the Kinsmen for over 25 years, served as President of Kin Canada, and established both the Kin Canada Foundation and the Saskatoon Zoo Foundation. He helped create the Community Fund for Reconciliation at Saskatoon Community Foundation, an initiative grounded in healing the community while tackling issues of systemic racism and inequity.

As co-founder of the Family Legacy Advisory Group team at Wellington-Altus Private Wealth, Curtis works with pre-retirees and business owners in building comprehensive plans for their financial futures. He is currently president of Advocis Northern Saskatchewan advocating for consumer protection for the financial sector.

Thank you, Curtis, for all you have given to our community.



Curtis Kimpton, CFP, CLU, RRC, B.Comm. reflects on his 10 years leading Saskatoon Community Foundation's philanthropic stewardship on behalf of its fundholders and donors.

How did you become involved with Saskatoon Community Foundation?

Both through my community service with Kinsmen Club of Saskatoon, and through my wealth planning work with Family Legacy Advisor Group, I became involved with the foundation. In my career, I work with pre-retirees and business owners who want to plan for their financial futures, and I have clients who have created funds with the foundation through charitable donations.

How did your family decide to create their fund with the foundation?

When my mom passed away 12 years ago, to celebrate her life, my family started the **Kimpton Family Fund** with Saskatoon Community Foundation. We rely on the foundation's grants committee to direct our fund to the areas of greatest need in our community. In time, our goal is to continue to invest and grow the fund to become a donor-advised fund. I have also decided that part of my legacy with the community foundation will be created from my insurance contract and my RRSP.

How does the work of the foundation connect with your personal values and your professional life?

I'm passionate about the foundation because you as a donor can support our community in any way, shape, or form you want. It is completely different than any other charity. You can create a personal fund that reflects your life and your values, and you can create your own unique legacy. You can choose to support multiple charities that are important to you.

In my wealth-planning business, my team and I help our clients accomplish their goals and dreams...our client is the focal point. Likewise, the foundation helps philanthropists accomplish their goals for making a difference and investing in their community. Philanthropy does not need to be complicated; it is truly exciting to be involved in, as you see the great outcomes of your giving and you live your legacy.

As you look back over the 10 years you have served on the board, what are some of the most memorable highlights of the foundation's work?

When I started with the foundation, I stepped into the role of Grants Committee Chair...and we revamped the granting programs and created the **Community Fund for Reconciliation**. That process was unbelievable. We engaged elders and community leaders to guide our process, we experienced the pipe ceremony and the blanket exercise, and we learned the story of the residential schools system from Gilbert Kewistep. The gala (series) was created, and this year was the final gala, Walk with the Wind. We were fortunate to have Eugene and Lorna Arcand lead us as cultural advisors. They have had an incredible impact on me in my personal journey toward reconciliation.

I served as Board Chair throughout the pandemic, and our foundation pivoted to become quick and nimble to serve the community's needs. The staff stepped up and did amazing work to support the community. The foundation worked with a network of agencies to address basic needs for Saskatoon's most vulnerable citizens and provide resources on the front lines.

I was part of the discussion and creation of the innovative Donor Advised Spendable Fund, inspired by the generational model of trust funds that pay out every 15 years. I am incredibly proud the foundation thinks outside of the box and will act as a great steward for the future.

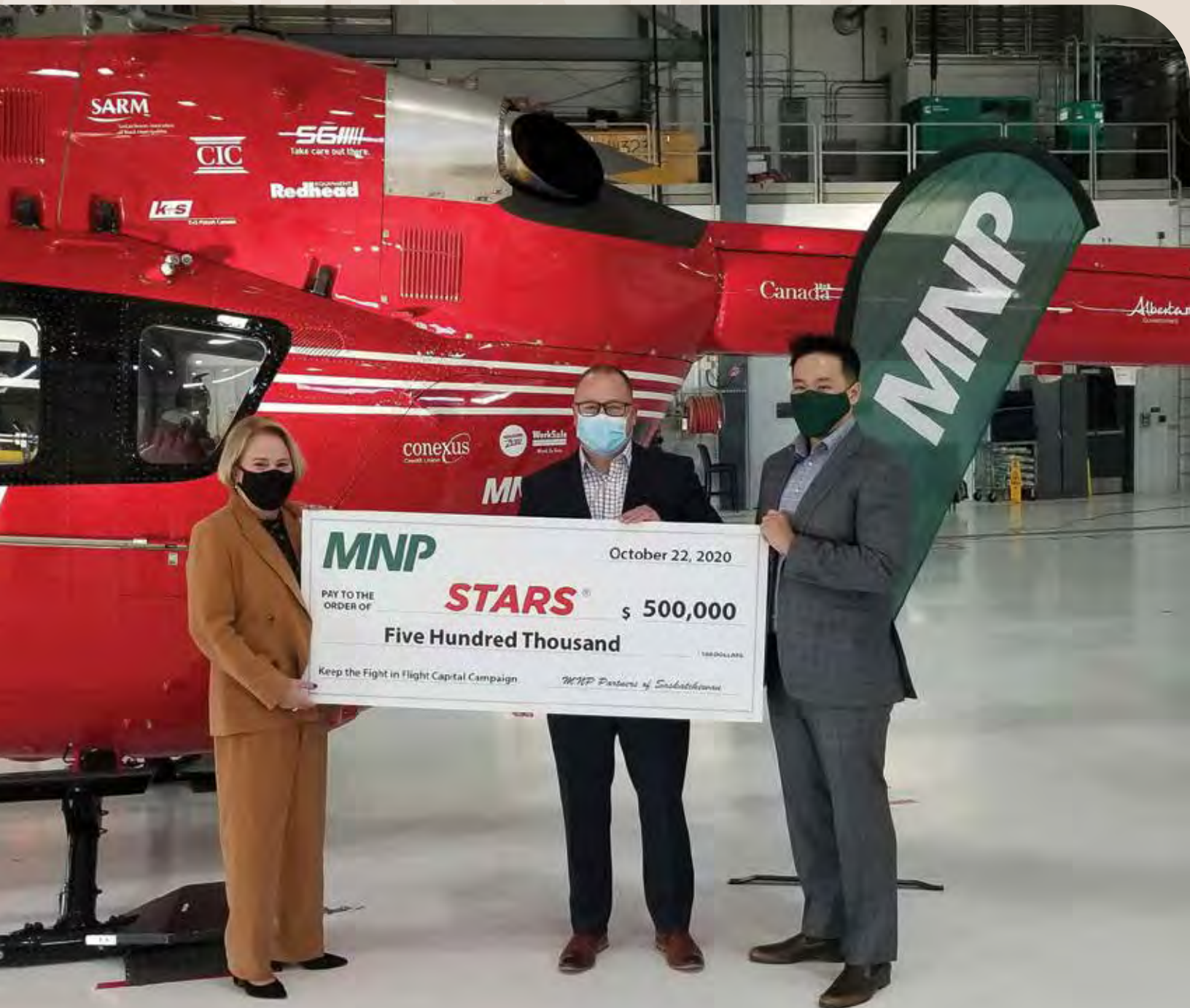
What would you like others to understand about giving back to the community where you live and work?

In any of the community roles I've had I can honestly say I've gotten back far more than I've given. The feeling you get, knowing the difference you can make by helping, is wonderful. My kids come to the Food Bank with me at Christmas, and we go to Ronald McDonald House, and they understand at 12 and 14 years old, what it is to give of yourself and help our community. The fact that I can pass that down to my kids...is unbelievable. If you do something for one person every day, you will change this world. I would encourage everyone to be that person who makes a difference. ●

MNP Partners Give Together for the Good of the Province

MNP offices anchor main street business districts in small centres across the province—and MNP Partners and team members have a strong presence throughout Saskatchewan, at a host of charity events and volunteer boards—they are often recognized on hockey rinks, football fields, billboards and more.

Saskatoon Community Foundation has recognized MNP with the 2022 National Philanthropy Day Honoured Supporters Award. Congratulations to all of the MNP Partners!





The **MNP Community Fund** at Saskatoon Community Foundation has impressive philanthropic reach across the province, funded by local MNP Partners with a collective vision.

The passion that drives MNP's charitable commitment is fueled by collective giving.

Together, MNP Partners have directed \$1 million in personal donations through the **MNP Community Fund** to a wide range of charitable initiatives and non-profit organizations over a few short years, investing in focus areas around Saskatchewan. Often, their financial support leads successful fundraising efforts at these charities and stimulates other contributions. While the donations are recognized as part of the MNP collective, these are personal cheques from a passionate group of individuals.

"Our entire team at MNP operates knowing we're stronger when we're working together," says Byron Mack, Regional Managing Partner. "It just made sense...that collaborating on a larger philanthropic scale as a partnership group meant we could have a more significant impact collectively than we could as individuals for our community. We knew it was the right thing to do."

Partner Tanya Knight describes how the **MNP Community Fund** at Saskatoon Community Foundation began: "The Partners' **MNP Community Fund** was created in 2016 with the MNP Saskatoon partnership group coming together and committing to donating personal dollars in support of community projects that made an impact in the quality of life for people in Saskatoon and Saskatchewan as a whole."

"We believe in supporting our communities and as a business with a long history in this city, we get asked to contribute to various sponsorships and capital campaigns. We believed that if we created some intention around our giving, we would give more collectively than any of us would individually. This was also a way for us to come together as business owners in the community and show leadership to the community and to our team," says Tanya.

"We knew that as individuals, we all were involved in giving but we weren't always aligned on the organizations we wanted



to support. Creating a fund within Saskatoon Community Foundation was the perfect solution as it created flexibility on what organizations, when and how much we support."

Saskatoon Community Foundation issues cheques to the charities selected by the MNP Partners.

The fund is administered by the professional team at Saskatoon Community Foundation which offers expertise in charitable giving, an understanding of community needs, and a network of partnerships with qualified recipients of charitable gifts.

The Partners' giving direction to the foundation is motivated by the passions of the Partners and the needs in their communities. As they see a need, the Partners bring a cause forward, pitching the charity and gaining agreement from the group. The power lies in collective giving.

"Partners contribute to the fund annually and receive their donation receipt upon contribution. We track each Partner's funds separately and each Partner determines where to donate their funds," Tanya explains. "As opportunities to give arise, Partners individually determine how much they want to donate, and we let Saskatoon Community Foundation know. They then administer the payment as per our direction."

MNP gives back to the communities where they live and work.



MNP's priority is giving back and supporting the community that its team members live and work in every day. Donations are often provincial in nature, collaborating with South Saskatchewan Community Foundation, Prince Albert & Area Community Foundation and Saskatoon Community Foundation.

"As an office of over 220 people and 38 partners, we are a significant employer in (Saskatoon) and have the opportunity to work with many business owners," says Tanya. "Our gifts are a way of giving back...so that we continue to have the community that we all want and so that we can continue to attract and retain great people."

MNP teams work in rural communities across the prairies.

MNP offices are located in small communities across the prairies, and the firm often works with First Nations and Indigenous Communities, agricultural clients, and Hutterite colonies. Likewise, the Partners' philanthropy has a wide reach and targets greatest needs.

The **MNP Community Fund** made a multi-year gift to STARS because of its big impact in rural communities, providing lifesaving healthcare and everyday access for clients in First Nations and Indigenous Communities. Partner Trevor Friesen describes the Partners' choice: "We work and live in communities that benefit from access to STARS. It is this connection to STARS' impact that motivated MNP Partners in Saskatchewan to personally contribute to this life-saving initiative."

"We're so thankful that our allies like MNP are able to give to STARS, when community support is so critical to our operations," said STARS president and CEO Andrea Robertson. "Our supporters ride along with us on every mission, and thanks to the leadership and generosity of MNP Partners, we were able to ensure our mission continues with a new fleet of helicopters that will serve patients and communities across Western Canada for decades to come."

MNP Partner Annette Bester was one of the Partners who spearheaded a collective gift for children's healthcare, when her niece needed specialized care after receiving a new heart.



MNP Partner Annette Bester and her niece, MNP photo.

"Our Partners all live in this community and have connections to various charities, whether that be sports, arts, education, etc. If a Partner has a charity they are passionate about supporting, they can share that idea with other Partners to gauge interest and consolidate our gift," says Tanya.

"We also give our (employee) team the opportunity to bring forward ideas and if they have an idea for our team to participate in that comes with a fundraising component, our Partners will match the funds raised."

Taking action to address emerging needs is also a focus for the **MNP Community Fund**. The Partners made a donation toward local support for people coming to Saskatchewan from Ukraine, as well as to the Ukrainian Canadian Congress. Resettled people with accounting backgrounds have become valued new team members with MNP.

Not only are the MNP Partners passionate about helping communities, they are strategic in their giving, using Saskatoon Community Foundation to establish multi-year gift agreements to direct funding for recipient organizations, creating much-needed stability for these charities' funding sources.

The **MNP Community Fund** has supported many charities and initiatives across Saskatchewan with multi year gifts, including Foundations Learning and Skills Saskatchewan (READ Saskatoon), Friends of the Bowl Foundation, Friendship Inn, Meewasin Valley Authority, Martensville Community Recreation Project, Remail Modern, STARS, Merlis Belsher Place and Vaccine and Infectious Disease Organization (VIDO) at USask. The Partners have also used the fund to direct major gifts and matching gifts to dozens of other charities from 2016 to 2022. ●

How Saskatoon Community Foundation Works

Beginning with a gift

You can make a gift of any size with cash, stocks, or other assets.

Your interests

We work with you to identify your goals and match your interests with community needs.

You choose a fund

You may establish a new fund or contribute to a community fund.

Investment

Your gift is invested and managed professionally to generate earnings for grants.*

Grants for charity

Grants are directed to charitable organizations according to your wishes.

Community impact

Saskatoon Community Foundation empowers you to create positive impact for a vibrant community.



WALK WITH THE WIND 2022

The Winds of Change for the Next Generation

The Nutrien Saskatoon Community Foundation “Walk with the Wind” Gala took place Sept 24. The gala series included wâseskwan – The Sky is Clearing, Spirit of Fire (2018), and Earth Song (2019). Immersive experiences of dance, song, music, performance, fashion, visual art, and fine cuisine, the events raised funds for the **Community Fund for Reconciliation**. Saskatoon Community Foundation has granted over \$685,000 for Indigenous-led partnerships since 2017 thanks to the cultural advisors, sponsors, and growing community of support.

“The need for reconciliation has never been greater and the winds of change are stirring our community to act for future generations,” said Carm Michalenko, Saskatoon Community Foundation CEO.

“We are committed to continuing to walk together, with our many corporate partners and supporters, to build on the growth and shift in our community to bring systemic change and a vibrant future.”



1 Azairah Isbister modelling ribbon skirt **2** Board Chair Danielle Favreau, Cultural Advisors Lorna and Eugene Arcand, and Past Chair Curtis Kimpton **3** Falynn Baptiste connecting people of all nations through song **4** The spectacular décor at TCU Place created by RSVP Event Design **5** Grass dancer Adrian Waskewitch



6 Gala Co-Chair Tracy Muggli is recognized by Saskatoon Community Foundation CEO Carm Michalenko and Past Chair Curtis Kimpton **7** Emcees Candace Wasacase-Lafferty and John Lagimodiere with Artistic Directors Dawn Wasacase and Carrie Catherine (centre) **8** Invocation by Elder Mariea Linklater and granddaughter Qwaleigha Linklater **9** Nutrien Senior VP & Chief Human Resources Officer Candace Laing **10** Cheryl Buckmaster creating a painting for live auction **11** Creeland Dancers **12** Choreographer and dancer Tatum Wildeman **13** Magic City Chorus **14** Tenor saxophone player Gregory Edmunds **15** Residential School and Sixties Scoop Survivors, Elders and family members



8



11



9



10



Learn more about Reconciliation Initiatives or make a personal or corporate donation:
saskatooncommunityfoundation.ca/initiatives/reconciliation/

TITLE SPONSOR

Nutrien

DIAMOND

KPMG Management Services LP
 Park Derochie
 Precision Electro- Mechanical
 Scotiabank
 SIGA

PLATINUM

PCL Construction
 SEI Institutional Group
 University of Saskatchewan

GOLD

Cameco Corporation
 Graham Industrial Services LP
 MLT Aikins LLP
 MNP
 Nutana Machine LTD
 Orano Canada Inc.
 Thomson Jaspar & Associates

SILVER

AMI Supply
 Black & McDonald Limited
 Dakota Dunes Community Development Corp
 Jeff Montgomery
 IG Wealth Management (Michael Burgess)
 Kelly Panteluk Construction Ltd.
 Procon Potash / Kitsaki
 Saskatoon Metal Mfg
 Saskatchewan Roughrider Football Club/
 Saskatchewan Roughrider Foundation
 Strike Group
 Victory Majors Investments Corp.
 Westburne

INDIGENOUS COLLECTION

Denison Mines Corp.
 Family Legacy Advisory Group
 Saskatoon Survivors' Circle
 Wyth Financial

MEDIA SPONSORS

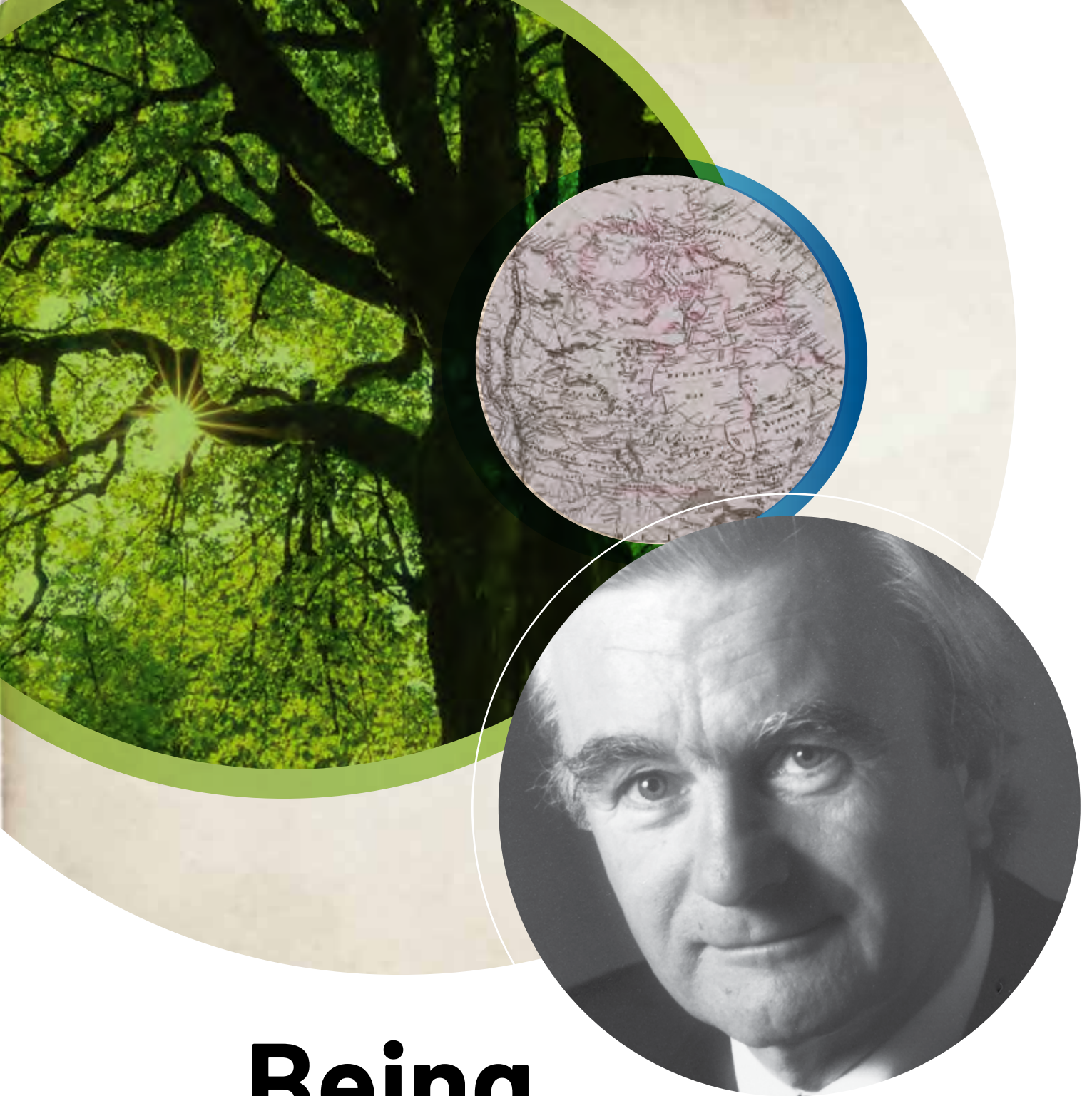
Saskatoon Media Group
 The StarPhoenix
 Shaw Communications

LIVE AUCTION

Stantec

GOODS & SERVICES

Black Fox Distillery
 Blossoms
 Chess Club
 Handy Special Events
 Mister Print / PrintWest
 RSVP Event Design
 Saskatoon Co-op Wine, Spirits
 & Beer Store
 TCU Place



Being Harry Koehn:

the Legacy of An
Exemplary Canadian

Upon his death in 2015, Harry Koehn established **The Harry Koehn Student Award** with a gift through his will. Harry's endowment at Saskatoon Community Foundation exists in perpetuity, granting funding for two Saskatchewan Polytechnic students every year, forever.

Harry Koehn's sons Tim and Richard worked closely with the foundation to honour their father's wishes, and they take an interest in the foundation's investments and the student selection process. It is important to the Koehn family that all students receiving his award understand Harry's legacy and learn about his life.

Born in Poland in 1925, Harry Koehn was a disciplined student and a track star. He came from a family of hard-working people who were skilled in a variety of Europe's needed services.

When World War II broke out, Harry enlisted in the Polish Army at the age of 18 but was immediately conscripted into the German Army when the Germans invaded Poland. Being forced to fight against his own countrymen troubled him for the rest of his life but he had no alternative.

At 19, he was severely wounded, and was held in a prisoner of war camp until the war ended. After his convalescence and release he finished his studies in Munich. However, he had no country to call home. He decided to emigrate to Canada in the early 1950's with his new bride, parents, and brother.

Harry wanted to be an exemplary Canadian.

On arriving in Canada, his first job was pumping gas. He completed his accounting exams and then traveled Saskatchewan auditing small firms. He received his Bachelor of Business Administration degree, and in 1955 was admitted into the Institute of Chartered Accountants of Saskatchewan.

Harry worked as the general manager of Boychuk Construction in Saskatoon before starting his own construction company, Plainsman Developments Ltd. in 1968. Plainsman Developments became one of the largest and most respected land developers and contractors in the province.

After retirement, he continued to invest in real estate projects in the city which gave him so much. Harry loved Saskatoon with all his heart.

Harry deeply respected tradespeople who worked hard and made a long-term commitment to their disciplines. He spoke several languages and was a voracious reader. During his lifetime he financially helped many people who showed ambition and integrity, some of whom paid him back decades later.

For Harry, a handshake was as important as a written contract, and he expected every person he dealt with to feel the same.

The **Harry Koehn Student Award** reflects Harry's belief that every person deserves a chance to chase their dream and succeed.

Student award recipients have included Medical Laboratory Technology, Computer Systems Technology, Medical Radiologic Technology, Dental Hygiene, and Business. ●

Create your lasting legacy with Saskatoon Community Foundation

saskatooncommunityfoundation.ca/give/legacy-giving-and-wills/

Be part of the Saskatoon Circle: Our shared legacy, your future gift

Saskatoon Circle is a group of donors who have decided to make a future gift to one or more charities through their will.

Our foundation works as a bridge with donors who want to direct their support to charitable organizations. You can support a cause that matters to you and your family, or you can memorialize a loved one with a fund in their name. Whether you want to designate your gift to healthcare, education, arts and culture, social justice, the environment, or another cause, we will ensure your gift is disbursed as you have directed.

It is easy to work with the foundation's Philanthropic Advisor to create a plan for your future gift that describes your exact wishes for your charitable giving through your estate. She

can help you explore giving options to help you make your plans confidently.

As you plan your gift, our Philanthropic Advisor can work with your lawyer, accountant, or financial advisor to ensure that your charitable goals are achieved while also minimizing your tax burden.

**Ask us for more information
about making a legacy gift.**

Contact Philanthropic Advisor Jen Pederson at 306-665-9880
or development@saskatooncommunityfoundation.ca



Meet our local Will Power® partners!

The Canada-wide **Will Power®** educational campaign from Canadian Association of Gift Planners (CAGP) promotes making a gift to charity in your will. A founding partner, Saskatoon Community Foundation has sponsored five local charity partners to participate.

Resourcing charities to do their good work is an important part of our foundation's mission to inspire philanthropy and bring community together.



Meewasin Valley Authority photo

Meewasin Valley Authority stewards our natural, vibrant river valley and its resources for present and future generations, promoting conservation balanced with human use and development.



Big Brothers Big Sisters of Saskatoon photo

Big Brothers Big Sisters of Saskatoon supports young people facing adversity, igniting their power and potential through life-changing mentorships. The organization has been creating life-changing matches for almost 50 years, serving over 400 young people annually.



Saskatoon Council on Aging photo

Saskatoon Council on Aging (SCOA) is a resource hub for older adults that promotes positive aging for all in an age-friendly community, so that older adults maintain health and independence, have access to services and know they are valued. SCOA promotes human rights, dignity and wellness.



Foundations Learning & Skills Saskatchewan photo

Foundations Learning & Skills Saskatchewan (formerly READ Saskatoon) is a literacy organization that provides free literacy services and tutoring to adults, families, and children to empower them with tools for building better lives.



Shakespeare on the Saskatchewan ED Melanie Rogowski and team, Photo by Alexandra Jarrett.

Shakespeare on the Saskatchewan is known for innovative adaptations of classical works that push boundaries. With the installation of a permanent amphitheatre base, box office, bar with riverside deck, dressing rooms, Contemplation Circle, and courtyard, the summer festival has grown to become a year-round attraction. ●



Visit willpower.ca to learn more about making a gift in your will.

Becoming an Accidental Philanthropist



L-R Joy-Ann Allin, Joanne McGrath, Carm Michalenko, Mark Halpern, Jen Pederson, Krys Hertzke. Photo by Matthew Ladouceur.

Saskatoon Community Foundation welcomed guest speaker Mark Halpern for a strategic estate planning workshop 'Creating your Saskatoon Legacy – Maximize Impact – Minimize taxes' on September 7 at the Saskatoon Club.

Mark spoke with a group of Saskatoon philanthropists and professional advisors, sharing ways to create charitable legacy by using tax-advantaged insurance solutions to protect families and preserve estates.

Saskatoon Community Foundation works closely with philanthropists and their accountants, lawyers, insurance, and investment professionals to provide expertise in directing charitable gifts for maximum community impact. Working with the foundation can be a time saving, cost effective alternative to private foundations and a wise strategy for gift planning to minimize taxes.

In working with your professional advisor, you may discover you are an "accidental philanthropist," a person who has accumulated considerable assets during your lifetime but has more money in your estate than what you have today.

Most individuals and trustees of family wealth don't realize the Canada Revenue Agency (CRA) is their partner in managing their money. The reality is that they can choose only two of three possible beneficiaries: CRA, family or charity.

"Paying taxes is an important responsibility in our country, but no one said you need to leave a tip." –Mark Halpern

Those who plan to leave the bulk of their estate to family and charity are called "accidental philanthropists," becoming philanthropists when given the opportunity to leave money to charity and family instead of the tax department.

The Importance of Planning

While most people understand the importance of budgeting and investing, planning is quite different. It's about preserving what you have, maximizing your income and minimizing the tax bite.

Planning with the right professional can help you with:

1. **Estate planning:** ensuring your "financial architecture" from years ago still is right for today and taking steps that align with your current goals and objectives.
2. **Tax minimization:** specializing in strategies to preserve more for your family and the charity you are passionate about.
3. **Philanthropy:** helping you create your enduring legacy, often by converting tax dollars into charitable dollars. ●

Source: "Accidental Philanthropy™ – From Success to Significance" The Tax Letter by Mark Halpern, CFP, TEP, MFA-P, CEO of WEALTHinsurance.com®.



Interested in making a charitable gift?

Contact **Philanthropic Advisor Jen Pederson** at development@saskatooncommunityfoundation.ca or (306) 665-9880.



How can professional advisors work with the foundation?

Contact **Advisor Associate Joanne McGrath** at advisor@saskatooncommunityfoundation.ca or (306) 665-1764.

Learn more about making charitable giving part of your financial plan.

saskatooncommunityfoundation.ca/giving/for-professional-advisors/

Canada Revenue Agency
Charitable Registration/
Business Number: 119140911RR0001



**I love my family. I also love my community.
I'm remembering both in my Will.**

Learn more about Will Power at willpower.ca/charities/saskatoon-community-foundation

