

CAUSE & EFFECT

Cultural institutions strive to preserve, foster Canadiana, arts

A favourite museum or theatre can be like a second home, a place you go to learn, to be inspired and to challenge your preconceptions.

Planned giving offers you a chance to maintain that connection far into the future, and to help ensure that your children and grandchildren can also enjoy institutions you value.

"If an organization has been particularly important to you during your life, why would it be less important after you're gone?" asks Leona MacDonald, director of endowment and planned giv-

ing at the Manitoba Theatre Centre (MTC) in Winnipeg.

She emphasizes that people don't have to be millionaires to leave a significant legacy without seriously affecting their heirs. A \$5,000 gift, for example, can deliver significant charitable impact yet not adversely affect an estate, especially if thoughtful tax planning strategies are employed.

Yet money is just one type of planned gift. After the 2006 federal budget eliminated the capital gains tax on donations of publicly listed securities, for instance, such bequests soared in popularity.

"Gifts of securities account-

ed for over 60 per cent of the funds donated to the foundation in our 2006-2007 fiscal year," says Marie Claire Morin, president and CEO of the National Gallery of Canada Foundation in Ottawa. "We are seeing more and more donors using this way of giving to make an initial donation, increase the value of their gift, or shorten the timeframe for completing a multi-year gift."

The National Gallery of Canada now offers information sessions on legacy planning to its patrons. "For donors, it is important to have sound information on the various ways of giving and their respective

advantages – for the donor, of course, but also for the National Gallery and its foundation – to ensure the decisions donors make optimally support their philanthropic wishes and the needs of the gallery," says Ms. Morin.

At the request of patrons, the McCord Museum of Canadian History in Montreal provides similar information to potential donors. However, most donors make planned gifts for emotional reasons that stretch far beyond tax breaks, says the museum's executive director, Dr. Victoria Dickenson. "If you just want a fiscal advantage, I'm sure you can

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put your money into all sorts of things.”

At the McCord Museum, people often donate collections of personal artefacts, such as memorabilia from Expo '67, that they want preserved for posterity. "There's a cohort moving through who grew up in an era...where Canada became a player on the world stage," Dr. Dickenson explains.

For a history museum, such gifts are not surprising, Dr. Dickenson says. "You're not usually 20 when you're thinking of this. You are looking back on your own life and thinking about what is significant to you." ■

Young entrepreneurs step up

In 2004, Tom Williams left a lucrative career in Silicon Valley, which he began at age 14 working for Apple, to start online charity GiveMeaning.com. The donor service has raised more than \$2 million for Canada charities alone. "As a natural marketer, I saw the opportunity to deliver a product that I was passionate about, and one that held tangible benefits for consumers."

Mr. Williams is one of many entrepreneurs who reflect a movement among dynamic, young executives committed to giving back to society. While Mr. Williams made philanthropy his sole focus, Vancouver-based Sarah

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McNeill, chief acceleration officer at McNeill Nakamoto Recruitment Group, has incorporated charitable giving throughout her firm.

"Once the company began to grow beyond its startup phase, we could now include corporate giving into our model," says Ms. McNeill. "We started at a micro level, with Christmas hampers for Big Sisters, followed by our annual wine silent auction."

Supporting Big Sisters was a natural choice for McNeill Nakamoto, given that Ms. McNeill is chairing the 2007 Divas Heroes benefit dinner and sits on the charity's honorary board. Each quarter, McNeill Nakamoto holds the

Career Launcher program for little sisters. "As a recruitment firm, it made sense for us to offer a program for little sisters to examine their career options and make decisions for their future," adds Ms. McNeill. "One of the best parts is that while I came up with the idea, it's actually run by our team at McNeill Nakamoto. They love it, and it genuinely builds the spirit of our company."

One thing that both Mr. Williams and Ms. McNeill emphasize is that it's about giving meaning and giving back. "Everyone wants meaning in their lives; engaging in philanthropy is truly a great path to real wealth," concludes Mr. Williams. ■



Sarah McNeill is among Canada's successful young entrepreneurs who have embraced philanthropy personally and as a part of a business philosophy. PHOTO: SUPPLIED

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