

Place2Give Advisor Toolbox

The SEDAR of charities, Place2Give is a web-based tool designed for wealth managers, financial planners, tax advisors, estate planners and lawyers providing up-to-date information on Canada's charitable sector. Research provided through Place2Give will lead to deeper, more meaningful conversations with your clients around philanthropy and the charitable sector.

With over \$100MM lost due to fraud by Canadian charities annually, and over \$1B lost in North America, providing your clients with accurate information is critical to establishing and maintaining strong relationships. Over the next few decades, we are anticipating an inter-generational wealth transfer in the Trillions. These funds can go to multiple sources, including charity. **Our goal is to help you establish and hold the trust of your clients and the NextGen clients through effective community investment and foundation management.**

How it Works

Our non-provisional patent pending algorithm matches your clients giving habits with charities that best align with those habits. Information analyzed in the following categories:

- Financial Management
- Governance & Policies
- HR & Admin
- Volunteer Opportunities
- Community Relations & Media
- Program Offerings

Client (donor) profiles are created for planning and research purposes. Charitable giving portfolios can be researched, matched to giving habits and transacted (optional) through the platform. Research generated can be as high-level as CRA information or as detailed as a landscape comparison to other similar organizations. We empower you to access charitable sector information when you want and how you want it. **We take the risk of philanthropic advising off your shoulders so you can focus on managing the funds to achieve financial and philanthropic success.**

Each advisor is given their own username and password to manage up to 10 clients with 3 standardized reports per client. Additional clients or specialized/customized reports can be added to the account.

For firms that do not have Donor Advised Funds (DAF) established or who do not manage foundation dollars, donation transactions can be made by cash or securities through our web-based platform. These transactions are charged a fee by a third party. The DAFs currently used by Place2Give are the Benefaction Foundation based in Montreal (for donation of securities) and the Canada Online Giving Foundation managed by Benevity in Calgary (for cash donations).

Product Offering

	Product Description	Standard	Firm (multiple offices)	Additional Options
10 Clients per Advisor	Charitable portfolios that are being managed by Advisor	X	X	
Client Charity Portfolio Report	Quarterly/Annual review of charitable giving	X	X	
Advisor Client Report	Quarterly/Annual review of all clients managed by Advisor	X	X	
Charity Review Report	Snapshot of Charity information	X	X	
Firm Branding	Customization of reports and web-portal to match Advisor's company	Additional Fee	X	
Additional Clients	Over 10 Accounts	Additional Fee	X	
Charity Landscape Report*	Snapshot of organizations addressing a similar issue, geography, salary comparison or operational size			X
Charity Comparison Report*	Side-by-side in-depth analysis of up to five similar organizations based on issue, geography, salary comparison or operational size			X
Special Report (client specific)	Specialized research requested by client			X
Philanthropic Advising Services	Face-to-face consultation with Dexterity Consulting	Additional Fee	X	

Fees (minimum annual membership)

Standard access to Advisor Toolbox:	\$35/month/advisor
Firm access to Advisor Toolbox:	10-49 Advisors: \$4,000/year 50-99 Advisors: \$20,000/year 100+ Advisors: \$40,000/year
Additional clients (over 10):	\$10/month
Customized reports:*	\$75/report
Specialized reports:*	Based on client requirements
Philanthropic Advising Services:	Based on client requirements

* Customized and Specialized reports have a minimum turn-around time of 48 hours. Advisor and/or client may be required to provide additional information.