

# LEARN TO GIVE CAMPAIGN



PhilanthropyLab®  
Empowered Giving





# LEARN TO GIVE CAMPAIGN

The Learn to Give Campaign will introduce to a select number of universities and colleges in North America a transformative curriculum and associated financial methodology led by Canadore College and PhilosophyLab. Undergraduate and graduate students from business, financial planning and philanthropic planning programs will learn effective methods of donation solicitation on behalf of charities.

The first university participating in the Campaign is Texas Tech and its graduate program in Charitable Financial Planning taught by Dr. Russell James.

With a campaign goal of \$10 million through the Learn to Give Campaign we will educate a new cohort of financial literate and capable students. They will enter the workplace with the skills and knowledge to affect real change in the charities they work and volunteer.

# CAMPAIGN OBJECTIVES

Campaign Goal: \$10 Million

The largest initiative of its kind in North America, The Learn to Give Campaign will teach 10,000 students financial literacy focusing on the social profit sector.\* Through relationship building, idea sharing and collaboration, we will strengthen North America's brightest minds and impactful charities.

## The Learn to give campaign will;

- Introduce an integrated curriculum with the teaching tool, GIFTABULATOR NOW, through collaborations and partnerships with universities and colleges across North America, increasing students' understanding of estate, financial, and philanthropic planning. **1**
- Work with educational institutions to establish effective internships and co-op placement programs for students pursuing careers as financial advisors and social profit sector professionals. **2**
- Give financial advisors and social profit sector professionals the skills and tools to direct funds being passed from one generation to the next through estate planning in North America to charities. **3**
- Reduce North Americans' taxes through charitable giving, redirecting the funds to charities in their communities. **4**
- Set off a multiplier effect whereby financial literate students and professionals educate the charities in which they intern and work, respectively, ushering in a trend of effective, engaged, and tenacious fundraising.

GIFTABULATOR NOW is a dynamic, interactive app that easily illustrates the need for estate, financial and philanthropic planning. **1**

Currently 80% of financial advisors said they would have more conversations related to charitable planning with clients if they had the training and tools. **2**

Have some sort of infographic saying its \$41 trillion, and that currently only 4% is bequeathed to charity. And show your source for that fact! **3**

"The case for charity independence - There are 80,000 charities in Canada and 963,255 charities in the United States, which are in large, funded by their governments, respectively. Let's reduce charity dependence on government! **4**

\* <http://www.theglobeandmail.com/life/giving/its-time-to-say-not-to-not-for-profit/article559824>



# ADDRESSING THE NEED

This collaboration has identified the need for specific training for students, financial advisors, social profit professionals, lawyers and accountants in estate, financial and philanthropic planning.

The growing importance placed on estate planning demands skills and innovative tools that facilitate the transfer of wealth from one generation to the next.

The market for experienced professionals who understand and can illustrate the benefits of estate planning is growing; so is the technology sector's

work and mass of talent in mobile and cloud financial application development. **1** The campaign addresses this need, combining education and skills development with Giftabulator into a unique and forward-thinking curriculum.

The curriculum is working, says Texas Tech's Professor Russell James: "The GIFTABULATOR NOW web-application is a great addition to our program helping the students - professionals working in the areas of financial advising and fundraising - develop more effective charitable financial plans."

According to High Net Worth Inc. in New York in 2011, 60% of the adult population does not have a will and 40% of high net worth individuals do not have a will. **1**



# PHILANTHROPYLAB AND CANADORE COLLEGE

The Canadore, School of Communication Arts faculty CFE and PhilanthropyLab through a community partnership identified a need for specific training for students, financial advisors, not for profit executives, lawyers and accountants, known as allied professionals, who wish to gain an increased knowledge and skillset in advising individuals and organizations in the area of charitable financial planning. The transfer of \$41 Trillion in the next 30 years from one generation to the next generation has created heightened

expectations for customized personal financial knowledge both on a technical and illustrative level and new devices has fuelled demand for skilled advisors among the allied professionals market. The market for skilled professionals who understand and can illustrate the benefits of estate planning is growing. This fact has been identified by the High Net Worth Inc. in New York in 2011 where 60% of the adult population do not have a will and 40% of high net worth individuals do not have a will.

## **The EDUCATE CAMPAIGN:**

10,000 STUDENTS FOR FINANCIAL LITERACY will help not only Canadore students to become financial literate but with the partnership of CFE this Campaign will promote financial literacy throughout Canada and Internationally.



# CONCLUSION

The Learn to Give Campaign will make a lasting impact on our way of understanding estate, financial, and philanthropic planning. Students at our education institutions will learn how to retain funding which is much needed by the charitable sector.

The Financial Industry will learn how to give back and work with their clients to strengthen the charitable sector. Finally, the charitable sector will learn to become self-sustainable by learning how to approach and maximize their potential.



# PLEASE SUPPORT

Together we can make the Learn to Give Campaign a success. Your contribution will help us to rethink and reimagine giving to the charitable sector, leading to stronger communities and a better world.

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