

Carver Boss Summit

Doing Well While Doing Good

How Business Owners Can Grow Their Companies, Reduce Taxes, and Create Lasting Impact

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A Question for Every Business Owner

- What will your business be remembered for?
- Profit alone?
- Or the lives it changed?



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The Zero-Sum Myth

- Old thinking: For me to win, someone else must lose.

New thinking: Businesses grow when they create value for

- Employees
- Clients
- Communities



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The Cost of Disengagement

- Disengaged employees cost the global economy
- \$8.8 TRILLION annually \approx 9% of global GDP

Source: Gallup – State of the Global Workplace



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Engagement Drives Growth

- Organizations with engaged teams grow revenue 2.5× faster

Source: Gallup / Engagement Multiplier



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Culture Drives Valuation

Companies with strong workplace culture saw

- 5.1× valuation growth vs 3.7× for weaker cultures
- ≈ 38% higher growth

Source: Alex Edmans – London Business School



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Costco vs Walmart Pay Study

Costco pays employees significantly more than competitors.

Results:

- Lower turnover
- Higher productivity
- Stronger customer service
- Higher long-term stock performance



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Source: Harvard Business Review analysis

Purpose-Driven Companies Outperform

- Companies focused on stakeholders outperform the market.
- Firms of Endearment study:
- 14× return over 15 years vs 6× for the S&P 500



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Source: Raj Sisodia / Harvard Business School

Turning Taxes Into Impact

- Strategic charitable giving can:
- Reduce taxes
- Support causes you care about
- Create lasting impact



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Donor Advised Funds

- Immediate tax deduction
- Donate appreciated assets
- Avoid capital gains taxes
- Flexible charitable giving



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Charitable Remainder Trusts

- Income stream for life
- Partial tax deduction
- Reduced capital gains taxes
- Charity receives remainder



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Charitable Lead Trusts

- Charity receives income first
- Assets transfer to heirs later
- Potential estate tax reduction



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Q4 2026 Action Checklist

- Identify charitably inclined clients likely to itemize in 2027; run 2026 vs. 2027 projections.
- Evaluate bunching strategies and DAF front-loading in 2026.
- Match asset-to-charity: use appreciated assets; preserve cash for liquidity.
- Coordinate with income events (bonuses, RSU vests, Roth conversions) to maximize 2026 sheltering.
- Confirm acknowledgment/appraisal workflows and filing calendars.



Corporations: 2026 Floor & Ceilings

- New 1% taxable-income floor applies to corporate charitable deductions
- 10% TI ceiling remains (with existing special-case exceptions)
- Planning: Consider 2026 contributions to avoid the floor; evaluate inventory/property rules and substantiation.



Purpose Attracts Talent

Employees who feel purpose in their work:

- Stay longer
- Perform better
- Are more engaged



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Source: Deloitte Human Capital Trends

Legacy

- Every business leaves a legacy.
- The question isn't whether you'll make an impact.
- The question is what kind of impact it will be.



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Thank You

