

The Altruism Advantage

Scaling Success by Prioritizing Philanthropy over Profit



Derek Strokon – Sacred Line Consulting

“Return things in
better condition
than when they were
given to you.”

-My Dad





SACRED LINE CONSULTING

FOLLOW THE SACRED LINE

I believe that the world is full of abundance, but recognize that its distribution is unequal. I'm on a mission to help level the playing field.

Through Sacred Line Consulting, I help financial advisors build impact driven companies that make a real difference.

We have built Community Funds in cities across North America helping advisors directly impact the causes that drive them, as they scale revenue and increase operational efficiency, by putting philanthropy ahead of profit.



SACRED IMPACT™
ACADEMY

On your deathbed, will you be most proud of...

How much **money** you **made**?

How **much** your car **cost**?

How **big** your home **was**?



Or will you think about...

The **impact** you made on **lives** of others?



So, **what** does this have to do
with being a **Financial Advisor**?



Whether you are planning for Growth or Succession,
You Need Clarity On

How to stay motivated?

How to differentiate yourself?

What impact you are really making?



Motivation

Next level growth often demands a new motivator.

“What got you here, won’t get you there”



Differentiation

WHAT we do

So what

Who cares

I should hope so...

WHY we do
what we do



Impact

Whoever sows sparingly
will also reap sparingly,
and whoever sows generously
will also reap generously.



The quote that changed my trajectory

Want to feel great about making \$1 Million a year?

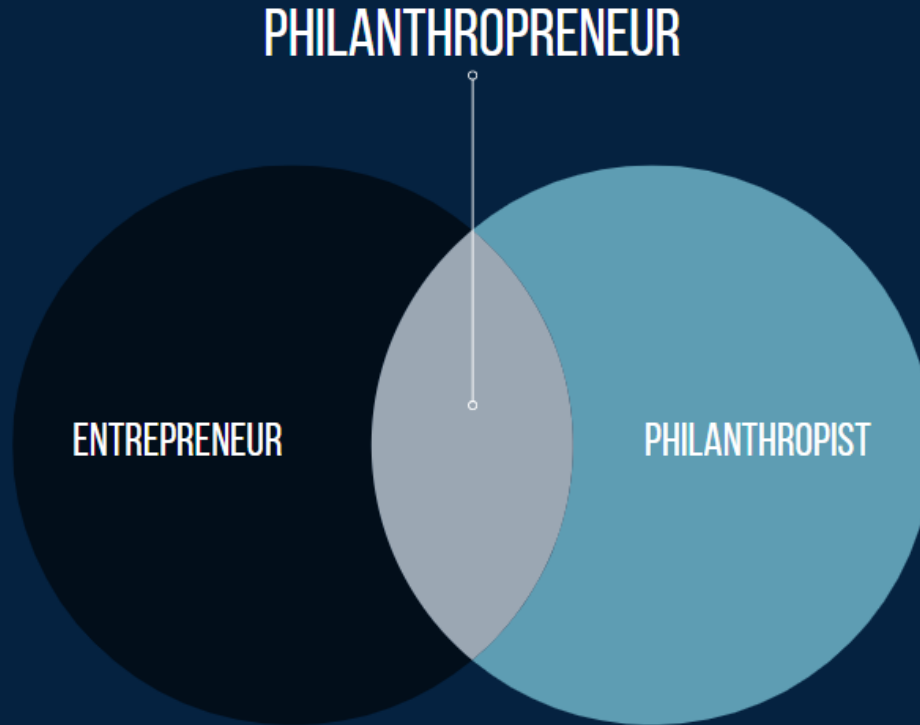
Make \$2 Million a year and give away half.

-Randy Molland

www.gobigtogivebig.com



What is the solution?



How do we do it?



Through creating a **profitable business** that incorporates **impact** as its purpose, **as your sales scale** in revenue, so does your **giving**... Allowing you to scale your **impact and improve all aspects of your life.**



Backing it up with numbers



Consumers Spend More On Brands They Believe In

When a company supports...

Have a more positive
that com...

Would be more
compa...

Would be more loyal to the
company (i.e., continue buying
the company's products/services)

Customers grow more loyal to
a brand when they believe in its
cause, which can increase lifetime
profits by as much as **85%**



Affluent Millennial	Millennial Mom
96%	95%
92%	91%
88%	90%



This doesn't just impact your clients



of employees who believe their company makes a strong positive impact on society plan to stay with their employer.



Is it okay to leverage impact?

Sharing about

Giving

is not a sales pitch

as long as it comes from a place

of Authenticity.



Who has a giving plan?

Is it on your **website**?

Do you **share** it with your clients?

Is it the **first** thing you share or show?



If it's not everywhere, it's nowhere...
It can't just be a sentence at the bottom of your e-mail signature

THE CUSTOMER IMPACT JOURNEY



SOCIAL MEDIA

Clients will see you posting about your impact on social media and be intrigued by your message more than your product.

WEBSITE

They will then go to your website to validate that you are standing behind your message and learn about your service.

ENGAGEMENT

Engagement strategies like newsletters, client events, and personal notes should all have a tie back to your giving initiative to ensure that your giving initiatives stay front of mind.

PURCHASE

When a purchase is made, clients need to hear that their purchase made an impact. This helps to give them ownership in the impact journey.

CONTINUED IMPACT

Above and beyond the excellent service and product that you deliver, your continued efforts to tell your impact story are a soft way to maintain engagement with your client base.

RAVING FAN

You have now created a following of ideal clients who are proud to be working with you and will become raving fans recommending you to their inner circle.



The Philanthropy Playbook



Business & Website Structure Model



<https://albertabusinessregistration.ca/alberta-business-registry/>

**ALBERTA BUSINESS
REGISTRATION**
SAME DAY SERVICE

*Alberta*
Authorized
Registry Agent

Incorporation ▾ NUANS Filings ▾ Unincorporated ▾ Annual Return Order Corporate Documents LLC for Foreigners

Alberta Business Registry

We are an authorized service provider of Alberta Corporate Registry and can deliver your filing documents within 2 business hours. Choose us, fill up the simple forms and get your documents.

Incorporate in Alberta

Package starts at \$350
2 Hours Rush Service available

[INCORPORATE NOW](#)

Alberta Annual Returns

Package starts at \$199
1 hour Rush Service available

[FILE NOW](#)

Alberta Tradename

Package starts at \$160
1 hour Rush Service available

[REGISTER NOW](#)

Alberta Sole Proprietorship

Package starts at \$160
1 hour Rush Service available

[REGISTER NOW](#)

Canadian Trademark

Package starts at \$975
1 Day Rush Service available

[REGISTER NOW](#)

Canadian Copyright

Package starts at \$375
1 Day Rush Service available

[REGISTER NOW](#)

www.theveritasfoundation.com



[ABOUT](#) - [THE GIVING FUND](#) - [CREATE YOUR ENDOWMENT](#) - [CHARITY REVIEWS](#) - [THE VERITAS 500 AWARDS](#) - [NEWS](#) - [CONTACT US](#) - [LOGIN](#)



Welcome to the World of Charitable Giving!

[Create Your Charitable Fund HERE](#)

[Deposit to an Account HERE](#)

[The Veritas-500 List of Canada's Fastest Growing Charities](#)

Create Your Own Charitable Foundation

In four simple steps individuals, families, organizations and companies can set up their own Legacy of Giving.

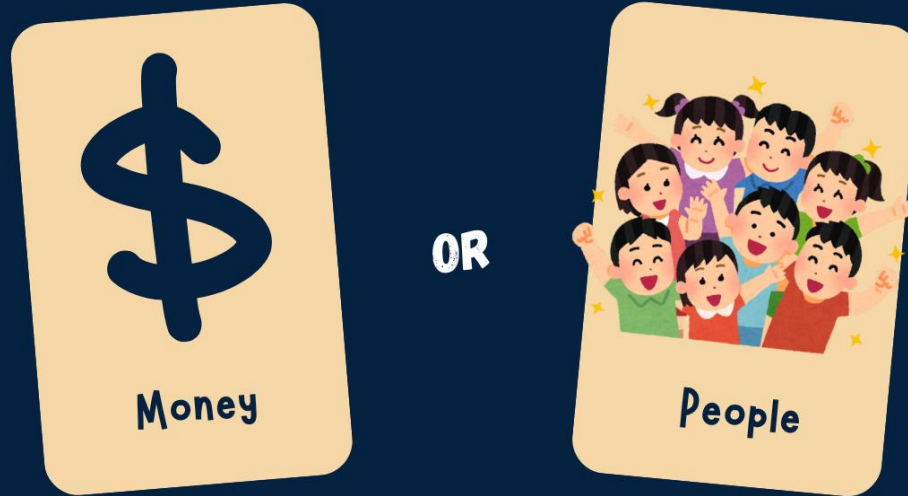


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**DONOR ADVISED
FUND**

Determine Your Impact Goal



Tell Your Story

Share what you believe.

Explain what you do.

Invite others to join you.

Building your Value Proposition?

I founded and operate the 12345 Community Fund. Its simple idea is that giving children the chance to play, helps build confidence, character, and community.

As a Certified Financial Planner, I use the revenue from my group benefits business to fund programs to support the kids in our community.

It's more than simply helping you build a robust Financial Plan using the best Investment Funds and Insurance Solutions. When you work with me, your success helps create opportunities for others.

Focused on impact. Built on purpose.

Living Proof right here in Lethbridge!



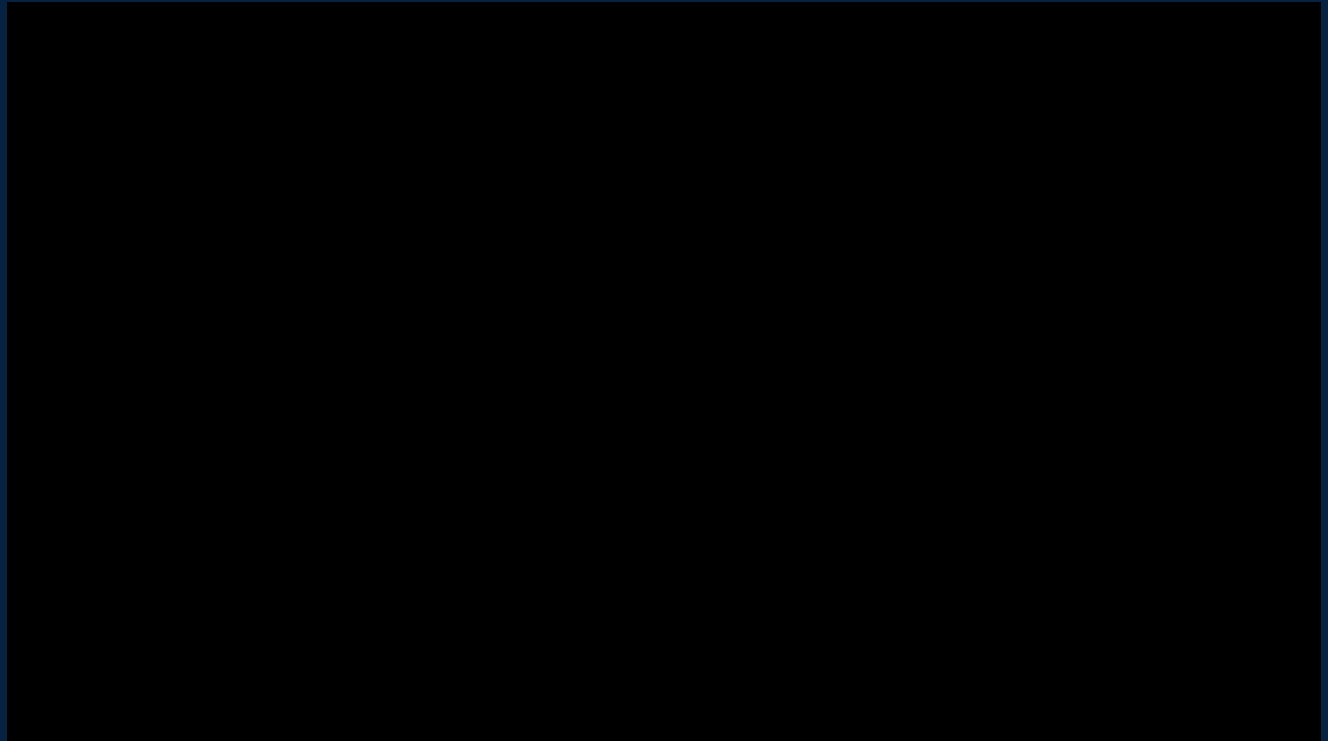
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Remember..

The bigger you go,
the bigger you can give,
and the more impact you can have.



Let's DO something about it!





recipe card

NAME OF DISH:
CONTRIBUTOR:
CONTACT EMAIL:

why this dish is special:

INGREDIENTS

- 15 breakfasts,
- 15 lunches,
- 45 dinners,
- 15 side dishes,
- 15 appetizers,
- 15 desserts.



TRANSFORMATION KITCHEN

— recipes for life —



recipe card

CATEGORY

DIFFICULTY

○○○○○

PREP TIME

COOK TIME

directions

PLEASE ENSURE TO INCLUDE A HIGH RESOLUTION PHOTO ALONG WITH YOUR RECIPE, EITHER OF THE DISH, THE RECIPE OWNER, OR WHATEVER YOUR FEEL TO BE MOST APPROPRIATE

Submit to:

DEREK.STROKON@SACREDLINE.CA

Thank You

[HTTPS://HR-4U.ORG/PROGRAMS/#TRANSFORMATION-KITCHEN](https://hr-4u.org/programs/#transformation-kitchen)



Thank You!



www.derekstrokon.com