



## Creating a Personalized Social Investment Strategy For Corporations

We are deeply grateful for philanthropic efforts from the business community. Your generous commitment to community can have a significant impact for your company, staff/team, customers, and the recipients – if properly invested. Take the guesswork out of developing your charitable giving strategy as part of your business plan.

By harnessing the power of the United Way's Advisory Services, you can use profits and growth as a means to a greater end: positive impact for your business, your employees and your community.

Your local United Way can help you develop and implement a wise charitable giving strategy.

### United Way's Social Impact Guarantee

The United Way invests in our region's top social agencies and initiatives providing the greatest impact in our local community, solving unignorable issues such as child poverty, unemployment, mental health, and domestic violence.

We say this with confidence because all funding requests undergo a rigorous three-stage process, managed by our knowledgeable and dedicated **Community Investment Advisory Committee** (CIAC). The top social agencies who successfully receive United Way investment are mandated to set targets so that progress can be monitored, and a **Return on Impact** (ROI) measured.

Last year, 93% of the social agency targets set were achieved or exceeded!

We also protect our investments by providing access to talent from the business community, and support to build capacity, strengthen leadership and foster good governance.

**A Corporate Donor's Story:** *"We take a strategic approach in all of our business practices, and we are no different with our corporate social responsibility initiatives. We firmly believe in giving back to our community – it is the right thing to do and it makes perfect business sense – if done right. The United Way has been terrific to work with, helping us align our corporate values and our employees' interests with the greatest needs in our community. We are now confident that we are supporting the most impactful initiatives that are improving people's lives, and we are getting the tangible reports that prove it. This is of huge value to us, our team, our customers, and most importantly, to the kids and their families who are being put on the path to a brighter future."* – Ray Robinson, Saint John Energy

### It's Easy To Get Started

It's easy to get on the path to setting up your charitable giving strategy and corporate social impact portfolio.

**Step 1: Get informed** - Have an initial conversation with a United Way advisor to find a fit between community needs and your corporate charitable interests.

**Step 2: Make a plan** - Select the charitable investment portfolio that is right for your business and team. Options may include annual or multi-year commitments.

**Step 3: Monitor and manage** - Monitor the impact of your social investment through bi-annually, or an agreed upon, project portfolio update.

# YOUR SOCIAL INVESTMENT ADVISOR

Helping optimize charitable giving to ensure a social return on investment.



United Way  
Saint John, Kings  
& Charlotte

## The United Way's Value Proposition

Give through the United Way with confidence, assured your gift will be invested in the best social support agencies having the greatest impact in changing local lives.

- We work with community organizations, government, and other funders to identify priorities for the community and for investment.
- We review all aspects of the potential funding recipient.
- We leverage funding from other sources to optimize impact.
- We protect investments by helping charities be resilient and effective.
- We monitor and manage your investments to maximize performance.
- We report on the performance of your investments.

## Gifts of Securities

Gifts of securities are a tax-smart way to donate to charities. This is something to keep in mind when making a donation. When you sell a security, you pay tax on 50% of the capital gain. However, if you donate a gift of securities to the United Way, the taxable capital gain is completely eliminated and you receive a tax receipt for the full market value of the security in the amount of the closing trading price on the day United Way receives the security – multiplying the impact of the tax benefit of your charitable giving. Please provide United Way with information about the number and type of shares to ensure we attribute the gift to the correct corporation.

## Recognition

Everyone likes to be recognized differently for their gifts. The United Way will design an individualized recognition plan that's right for you and your business.

## Get Started Today

Thank you for learning about our **Social Investment Advisory Services**. Call Alexya Heelis, Executive Director, at 506.658.1214 to get started today.