

MAKING AN IMPACT

Issue XVIII

A Newsletter on Philanthropy and Legacy

June 2009



Welcome to **Making an Impact** from Impact Wealth Advisors Ltd. We are committed to increasing the impact of philanthropy in our community and are pleased to provide a periodic update of charitable issues and events. Our hope is to make an impact by helping donors match their passions with the visions of non-profits. If you find this newsletter informative, tell us. We can send it to the people you've handpicked!

WORDS TO LIVE BY



The deed is everything, the glory naught.

- Johann Wolfgang von Goethe

UPCOMING EVENTS



✦ **Boulder Sunrise Tri-Du-Run** to benefit *the nonprofit of your choice!* When: Saturday, June 6, 2009; 5:30-7:30 is packet pickup and the race begins at 8:00am. Location: Boulder Reservoir. Join your community in an event that will benefit a charity of your choice while enjoying a beautiful race venue, a fantastic goodie bag and awards and raffles. Registration has begun and the fees vary. Visit www.yourcausesports.org for more information.

✦ **Access Rocks! Dinner and Dance Showcase Event** to benefit *Access Counseling*. When: Saturday, June 6, 2009; 6:30-10:00pm. Location: Avalon Ballroom, 6185 Arapahoe Ave., Boulder. Be a guest for an evening of tango, hip hop, swing and salsa dance performances. You will also be able to participate in live and silent auctions. Dinner provided by Carrabba's Italian Grill, wine and beer provided by Superior

Liquor and Lefthand Brewery. Visit www.accessboulder.org for ticket information.

✦ **19th Annual Avista Adventist Hospital Foundation Golf Classic "Birdie for Babies"** to benefit *The New Life Center at Avista Adventist Hospital*. When: Tuesday, June 9, 2009; 6:30am. Location: Coal Creek Golf Course, Louisville. This year's event will raise needed funds to provide things such as on-going training for the staff of nurses and personnel, fetal and neonatal monitors, and patient financial assistance to families in need. Email foundationevents@centura.org or call Geoff at 303-715-7619 for ticket information. Visit www.rmahf.org for more information on the Hospital Foundation.

✦ **The Boulder County Bucket List** to benefit *Aging Services Foundation*. When: Thursday, June 11, 2009; 6:00-9:00pm. Location: The Academy, 970 Aurora Ave., Boulder. Enjoy dessert, coffee and tea along with fine company and bid on experiences of a lifetime. Visit www.agingfoundation.org to purchase tickets.

🍃 **"I Have a Dream" 7th Annual Golf Tournament** to benefit *I Have a Dream Foundation of Boulder County*. When: Thursday, June 18, 2009. Location: Colorado National Golf Club (formerly Vista Ridge Golf Club), Erie. The golf package includes a continental breakfast, green fees, driving range, golfer contests, on course beverages, arrival bag and a fantastic awards luncheon. The tournament sells out quickly, so visit www.ihadboulder.org or call Priscilla at 303-444-3636 x 15 to reserve your spot!

🍃 **Ovarian Cancer Climb for Life** to benefit *HERA Women's Cancer Foundation*. When: Friday, June 26, 2009-Saturday, June 27, 2009. Various locations in Boulder. Whether you're a beginner or experienced hiker or climber, a cancer survivor, a caretaker, or just looking for a great way to have fun, this event is for you! Enjoy climbing with professionals, learn to climb at instructional clinics, participate in yoga classes, get free massages, dinner and drinks, raffles, and live music all while benefiting an important cause. All money goes directly to the HERA Foundation. Visit www.herafoundation.org to register and find out more details about this great event.



Philanthropy is most rewarding for you and to those whom you give, when it's practiced effectively. Many have had to tighten their budget and re-evaluate what they can do to make the most impact. Review the following areas to make sure that your philanthropic goals are integrated with your personal and financial goals:

- 🍃 Plan your giving to maximize it's impact.
- 🍃 Follow your passion to give your philanthropy personal meaning.
- 🍃 Explore the different ways to give to your favorite cause.
- 🍃 Find out the benefits of giving.
- 🍃 Understand the different tax deductions for charitable gifts.
- 🍃 Compare your giving options.

To help you with this process, you'll find the next paragraph very informative.



Fidelity Charitable Services helps individuals, companies, and their advisors make smart decisions that can help them achieve their philanthropic goals. They offer a broad range of services including: dedicated customer service with charitable giving expertise available to provide any support needed; multiple solutions for donors with substantial assets, complex financial needs, and complicated tax issues; updates on changes to legislation and tax implications that affect charitable giving; industry-leading information on giving options and strategies, with online tools and resources. They can also help research and support the causes that are most important to you while considering your financial plan, time horizon, and legacy goals to maximize your charitable impact. They believe a solution that is simple and efficient will lead to increased giving. For more information about their services, please contact us.

GIVING IN HARD TIMES



Hard economic times call for new and inventive ways of giving. We'd like to put the invitation out to our readers who have found successful ways of supporting their favorite causes despite the recession. Please tell us your positive experiences and we'll post them in a future newsletter!



The current impact of the recession as of February 2009 is highlighted below:

▮ 60% of those surveyed consider themselves healthy but currently vulnerable about the future. More than half have already experienced the reduction or elimination of funding from a major supporter due to the economy.

▮ The majority of respondents report their organizations will engage in more fundraising activities during 2009.

▮ Human services organizations reported difficulties in meeting current client needs and health care organizations expect significant demand for services.

Why not keep in mind the areas or organizations that need more help this year, and find out what steps they're taking to increase awareness, so that we can make an impact?

Statistics taken from Colorado Nonprofit Association



We would like to extend an invitation for the use of our office conference room to non-profit organizations that may lack space for meeting together. Because our goal is to network those in the community with others who share the same values, we are happy to do whatever we can to facilitate those who are involved in this process. Please feel free to contact us if this is something you would be interested in.



Impact Wealth Advisors Ltd.

We believe that adopting a holistic planning approach that focuses first on your life goals and aspirations improves the chances of achieving the future that you envision. We provide comprehensive, fee-based wealth management services to help simplify your life so that you can focus on the things that matter most. Acting as trusted advisors, we build a relationship with you and get to know you on a personal level. We offer thoughtful, intelligent counsel and work to develop wealth management strategies tailored to your specific needs and goals. We offer "Advice for Life." Please contact us to schedule a visit.

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