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Making an Impact



Issue XIII

A Newsletter on Philanthropy and Legacy

January 2009

WELCOME

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. As always, we welcome your input!

WHAT WE'VE BEEN DOING



It's been a new and exciting year for us at Impact Wealth Advisors. We opened our doors February 1, 2008 and have experienced nothing but support and love from clients and friends. We are proud to be an independent advisory firm, especially in light of the events on Wall Street this year. In September we had our 'open house' where our guests mingled and developed new networks. At the open house we introduced our friends

from the Wild Animal Sanctuary and Helping Hands Bakery. Bridget Lane from Helping Hands Bakery seeks to raise awareness and money to help children with special needs by baking gluten free cookies (which are delicious!) and selling them on her website

www.helpinghandsbakery.com

Impact Wealth Advisors is helping her pro bono set up a business plan to coordinate a number of projects for 2009 including, a summer concert and getting her cookies into local coffee shops. We are also advising three local software companies with family legacy or philanthropy as part of their platform and hope to be introducing their services in the coming year. As wealth management advisors, we are committed to creating a process to help families discover and build their family legacy. This newsletter has highlighted some of the ingredients to do so and in 2009 we hope to offer workshops on family issues such as family histories, family philanthropy and purposeful trusts, so stay tuned! In the

world of philanthropy, we will continue to sponsor the quarterly Making an Impact Award, as well as identifying and working with new non-profits looking to make a difference. To all of our clients and friends, we are especially grateful for the opportunity to earn your trust and respect in helping you and your families attain your financial goals. We look forward to this New Year filled with health and prosperity!

Anthony, Ken and Tracy

UPCOMING EVENTS



- **Imagine! Celebration Dinner and Auction** to benefit *Imagine!*
When: Friday, January 23, 2009; 5:30-10:00pm. Location: Radisson Conference Center, Longmont. Tickets are \$95 per person and \$1,250 per a table of 10. For more information please contact Susan LaHoda at

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slahoda@impaginecolorado.org
or call 303-666-7018.

RESOLUTIONS!



As the New Year approaches, many begin thinking about what we would like to accomplish in the year to come. We often use these goals or resolutions to guide us and help us keep things in perspective. The "***I Have a Dream***" **Foundation of Boulder County** is asking community members to consider adding volunteering to their resolution list this year. They are seeking volunteer tutors and mentors to work with low-income, at-risk students in Boulder County. The school drop-out prevention program for low-income youth uses academic support programs, long-term mentoring relationships and the guarantee of a tuition-assistance scholarship to help children achieve their dreams.

Volunteer opportunities are available in the areas of tutoring, personal and career mentors and technology volunteers. The next tutor trainings begin January 8th and do require reservations. Why not make this opportunity a part of your new year?

Visit www.ihaveadreamboulder.org or call 303-444-3636 ext 19 for more information.

COMMUNITY OUTREACH



The Family Learning Center provides space for low-income residents for family celebrations such as birthdays, weddings, memorial services, graduation parties, etc. They also provide space for other groups and organizations that share the Family Learning Center's values and mission. If you would be interested in reserving a space for an event please visit www.flcboulder.org or call 303-442-8979.

WORKPLACE CAMPAIGN



Expanding your workplace giving program is easy and it gives your employees so much more choice in making painless donations to charitable organizations addressing their concerns. It also gives your company the opportunity to further emphasize its aim of 'giving back' to the community. **Community Shares** has a wonderful program that can help you get started! The first step is to distribute a Community Shares pledge form and brochure to each employee. Though not required, a personal appeal gives employees a better understanding of their giving

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options and a chance to ask questions. Community Shares' staff and volunteers are available at any time for a 5-minute presentation for interested employees. Upon the close of your campaign period, collect all employee pledge forms and return the Community Shares copies and any cash donations. Their staff is available to assist in filling out the campaign summary, help review and tally pledge forms and input information in Excel format. They also provide all support necessary to make your campaign run easily and effectively. You may then transmit payroll deduction contributions to Community Shares on a monthly, bi-monthly or quarterly basis. They will track all agency designations and distribute funds to member agencies accordingly. To learn more about adding choice in giving to your company's employee giving campaign they will answer any questions you have, and provide all the information you need to include Community Shares in your next workplace giving campaign. You may visit www.cshares.org or call 303-861-7507.

REMEMBERING OTHERS



During these cold winter months our thoughts are with those less fortunate who may not have a warm meal or place to sleep each night. The **Boulder Shelter for the Homeless** began 25 years ago and

still relies on the kindness and generosity of thousands to make its services successful. Each year 1,000 men and women turn to the Shelter for help and each has a unique story. Some have been on the streets for years while others find themselves with nowhere else to turn for the first time in their lives. Some are battling addictions or mental health issues while some have just had a string of setbacks. Some never made it through high school and some have advanced degrees. The one thing they all have in common is that they are poor and they have turned to the Shelter as a last resort. Just to give you an idea of the kind of impact your donation makes: \$315 purchases 350 hot meals (a week's worth of food for 25 men and women). \$128 pays for four nights of shelter and services for a working homeless person. \$25 funds a night of safe shelter and all services for a resident. There are many volunteer opportunities including cooks, kitchen volunteers, as well as staff and program assistants. All of us may face times when we need a little help, so let's show our community we care by giving where we can this upcoming year! For more information please visit www.bouldershelter.org or call 303-442-4646.

BUILDING YOUR LEGACY



Last month's issue discussed building your legacy based on your family's philanthropy. This month we will discuss **succession and transfer**. Succession and transfer strategies leave a lasting impact on future generations and are created by your family vision. By using tools such as 'purposeful trusts' families can hope to build their human and intellectual capital for many generations. How?

1. Have an annual family meeting or retreat where you can discuss your vision and mission statement.
2. Attend an education seminar or a coaching session to teach you how to accomplish this.

For more resources please visit our website <http://www.impactwealthadvisors.com/resources.htm>



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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.

Great reviews are to be shared with friends, family and colleagues. If you find this newsletter informative, tell us. We can send it to the people you've handpicked!

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