



1434 Spruce Street, Suite 310  
Boulder, CO 80302  
Phone (303) 962-9232  
Fax (303) 962-9231  
[www.ImpactWealthAdvisors.com](http://www.ImpactWealthAdvisors.com)

Securities offered through  
LPL Financial  
Member FINRA/SIPC

---

---

# Making an Impact



---

Issue IX

A Newsletter on Philanthropy and Legacy

September 2008

---

---

## 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!

---

## MAKING AN IMPACT AWARD



Each quarter we recognize a client or friend of Impact Wealth Advisors and make a contribution of \$250 to the non-profit of their choice. For the third quarter we recognize our friend and client Sabrina Huffaker. She is the director of the non-profit **Forward Steps**. Forward Steps is focused on individuals leaving the foster care system. They provide the critical elements of

education, life skills, and housing support so they can start to direct their futures. With a goal of mentoring, educating and empowering some of our communities most vulnerable youth, Forward Steps provides hope and opportunity. By investing in their lives, Forward Steps empowers these young adults so they can reach their full potential as active, independent, self-sufficient members of the community. Thank you Sabrina for making an impact! Please visit their website at [www.forwardsteps.org](http://www.forwardsteps.org)

---

## UPCOMING EVENTS



• **Tri for Your Cause** to benefit a charity of your choice! When: Saturday, September 6, 2008; Start time: 9:00am. Location: Boulder Reservoir. Participate in a triathlon that allows you to select a non-profit of your choice that you and others can donate

too. The Entry fee is \$85 for individuals, which will be donated to your non-profit. For more information on participating please visit [www.triforyourcause.com](http://www.triforyourcause.com)

• **Buffalo Bike Classic** to benefit CU Boulder scholarship programs. When: Sunday, September 7, 2008; ride times begin between 7:00am and 9:30am. Choose between a 14, 30, 50, 70, and 100-mile course. For registration information please visit [www.buffalobicycleclassic.com](http://www.buffalobicycleclassic.com) or call 888-543-7223 x 4.

• **Kaleidoscope** to benefit Attention Homes. When: Thursday, September 11, 2008. Location: Rembrandt Yard, Boulder. Tickets are \$50 before 5:00pm on September 5, 2008 or \$65 at the door. Evening gathering beginning at 6:30pm includes cocktails, hors d'oeuvres, live entertainment, silent auction and a few surprises! For more information please visit [www.attentionhomes.org](http://www.attentionhomes.org) or call 303.447.1206.

# Making an Impact

• **2008 Penfield Tate Humanitarian Award Dinner and Auction** to benefit *The Family Learning Center*. When: Friday, September 19, 2008. Tickets are \$120 per person or \$1200 for a table of 10. For more information please visit [www.flcboulder.org](http://www.flcboulder.org) or call 303-442-8979.

• **2008 Dandelion Ball** to benefit *Boulder County Mental Health Center*. When: Saturday, September 20, 2008; 5:30pm-11:30pm. Location: The Stadium Club at the University of Colorado's Folsom Field. The evening features hors d'oeuvres, silent and live auctions, after-dinner drinks, sweets and live music from The Dave Fulker Jazz Quartet. Tickets are \$125 per person or \$1,250 for a table of 10. For more information please visit [www.mhbc.org](http://www.mhbc.org) or call Kelly at 413-6287.

• **2008 Dream-Maker Luncheon** to benefit *I have a Dream Foundation of Boulder County*. When: Friday, September 26, 2008. Location: Millennium Harvest House Hotel, Boulder. For more information please visit [www.ihadboulder.org](http://www.ihadboulder.org) or call Priscilla Gonzales at 303-444-3636 x 15.

• **Jam for Justice** to benefit *Safehouse Progressive Alliance for Nonviolence*. When: Friday, September 26, 2008; 8:00pm-11:00pm. Location: Boulder Broker Inn. This lively event will feature dancing, salsa lessons, and hors d'oeuvres for all who attend. The event will also feature a silent auction, with exciting products and gift certificates from many local businesses. All proceeds will go toward their programs and services provided to victims of

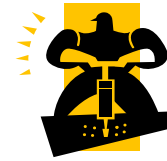
domestic violence. For more information please visit [www.bouldercountysafehouse.org](http://www.bouldercountysafehouse.org) or call Jacinda Lay or Tracy Salma at 303-449-8623.

## WAYS TO HELP



In honor of the life of David Parrish, a young man dedicated to helping everyone he came in contact with, Soles4Souls has developed the David Parrish honorary flip flops. David of Boulder, Colorado, passed away in Puerto Vallarta, Mexico on March 26, 2008 of a gunshot wound while attempting to prevent an armed robbery against his mother. Truth with humor and kindness, justice with love and fairness, and beauty in all things were David's principles. He believed they could transform our troubled world, if given the chance. Help continue the mission of David and Soles4Souls - getting shoes to those in need - by purchasing these unique sandals. Made with a logo designed by David and his sister Lesley, featuring the Flatirons, these flip flops will offer relief to someone in desperate need. Your \$10 purchase of a pair of flip flops means that 2 additional pairs will be donated and sent to Africa for people experiencing hardships there. The flip flops will be available for shipment beginning in September 2008. To order your pair, please visit [http://www.soles4souls.org/ways\\_to\\_help/david\\_parrish.html](http://www.soles4souls.org/ways_to_help/david_parrish.html)

## BUILDING YOUR LEGACY



**Legacy** is a road map for the future, a memorable and enduring imprint of life, or simply the implication that someone's life has meaning. **Legacy** captures all facets of an individual's life, family tradition and history, individual values and personal wishes, and accumulated wealth. **Legacy** is not just money, but your reputation, what you've done, and the impact you've made on the world. Building your legacy involves 4 main elements:

1. Your family's traditions and history.
2. Your personal wishes and values.
3. Your philanthropy.
4. Your succession and transfer.

In following issues we will discuss further the impact building your legacy will have on you and your family.

## CHECK OUT THIS WEBSITE!



• [www.boldergiving.org](http://www.boldergiving.org) includes stories of extraordinary givers as well as tools and a resource list to help you explore your giving potential.

---

## SUGGESTED READING



---

### **Powerful and Innovative Ideas for Grantmakers, Investors, and Nonprofits and Mission Related Investing (philanthropy's new passing gear).**

These two books are available at no charge from Rockefeller Philanthropy Advisors. They discuss the new tools available to treat 'change' as a product and how these tools can teach philanthropies to invest as well as give. We encourage family foundations, corporate foundations and individual donors to learn about these new ideas. If you would like us to order you personal copies, or if you have any questions or comments, we welcome your phone call. You may also visit their website to download the information or order the books at

[http://rockpa.org/ideas\\_and\\_perspectives/publications/](http://rockpa.org/ideas_and_perspectives/publications/)

---

## LIVING GREEN



---

While the main goal of our newsletter is to promote

philanthropy we also feel it's important to raise awareness of the needs of our environment and ways we can all do something small to keep our earth beautiful. Impact Wealth Advisors is proud to be part of **Eco Green Office** which is dedicated to the enhancement of green-minded organizations while making a positive impact on the environment. Their mission is to offer affordable environmentally friendly office products and services for organizations and individuals striving to be green. Some of their products include toner cartridges, paper, pens and pencils, furniture and tables, trash bags and even earth friendly coffee. Visit them at [www.ecogreenoffice.com](http://www.ecogreenoffice.com) To find out who is eco-friendly near you, please click on the "Partners" tab for local businesses who participate.



---

At Impact Wealth Advisors, 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 simplify your life so that you can focus on the things that matter most. Acting as partners and 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 solutions 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!**

If you do not wish to receive this newsletter, please reply with "unsubscribe" in the subject line.

The opinions in this material are for general information only and are not intended to provide specific advice or recommendations for any individual. To determine which investment(s) may be appropriate for you, consult your financial advisor prior to investing.