



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

Securities offered through
LPL Financial
Member FINRA/SIPC

Making an Impact



Issue XI

A Newsletter on Philanthropy and Legacy

November 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!

UPCOMING EVENTS



• **Celebration XVII-Hawaii Nine-O** to benefit **EFAA**. When: Saturday, November 1, 2008. Location: Omni Interlocken Resort in Broomfield. Mark your calendars for this year's event of dinner, dancing and auction. For more information please contact Karen Joiner at Karen@efaa.org or 303-951-7677.

• **The Annual Gala for Women's Health** to benefit **Boulder Valley Women's Health Center**. When: Friday, November 7, 2008; 7:00pm. Location: St. Julian Hotel & Spa, 900 Walnut Street, Boulder. Tickets are \$75 per person (\$50 is tax deductible), and sponsorships are available starting at \$250. Featuring live music, exquisite food, decadent desserts and an extraordinary silent auction. You may purchase your tickets securely online at www.bvwhc.org or call Amy Rosenblum at 303-440-9320 ext 11.

• **4th Annual Promise for a Future** to benefit **Attention Homes**. When: Wednesday, November 12, 2008; 5:30pm-9:30pm. Location: Flagstaff House Restaurant, Boulder. Tickets are \$150 per person and black tie is optional. The evening includes an exquisite three course meal, bidding on live & silent auctions, and a presentation from a former youth resident. For more information please visit www.attentionhomes.org or call 303-447-1206.

• **Girls Night Out** to benefit **Parenting Place**. When: Thursday, November 13, 2008; 6:00m-8:30pm; Location: Rembrandt Yard, 1301 Spruce St, Boulder. Tickets are \$25 in advance, \$30 at the door and include a raffle ticket. Light snacks, wine and decadent desserts will be served as you do your holiday shopping. Vendors will be selling unique items and music will be provided by a live jazz trio. For more information or to reserve tickets please visit www.boulderparenting.org or call Jessica at 303-449-0177 ext 0.

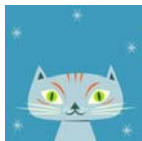
• **"And the Beat Goes On"** to benefit **Boulder Community Hospital**. When: Saturday, November 22, 2008; 10:30am-2:00pm. Location: Omni Interlocken Resort in Broomfield. Tickets are \$70 per person, or \$700 for a table. The event includes a fashion show featuring local retailers and models from the community as well as a luncheon. For more information please visit www.bchauxiliary.org or call Pat at 303-440-2183.

CELEBRATE!



National Philanthropy Day is Friday, November 14, 2008. This special day is set aside to recognize and pay tribute to the great contributions that philanthropy -- and those people active in the philanthropic community -- have made to our lives, our communities and our world. Can you celebrate this day by giving back in your community?

A TEA PAWTY



Join the **Boulder Humane Society** for their first annual **Tea Pawty!** Unwind with tasty desserts, beverages and visit with shelter animals as they join the party. Festivities include a behind-the-scenes tour and a digital photo commemorating your delightful afternoon with the animals -- a perfect way to spend the afternoon with visiting relatives and support the homeless animals during the holiday season! The pawty will be held Friday, November 28, 2008 from 2:00pm to 4:00pm at the Humane Society of Boulder Valley Education Center, 2323 55th Street, Boulder. Cost is Adults \$20 and Youth \$10. For more information please visit www.boulderhumane.org

SPOTLIGHT ORGANIZATION



Teaming for Technology Colorado is a nonprofit program dedicated to building better communities through technology. Their goal is to empower Colorado nonprofit organizations to effectively use technology to further their missions. They provide information and referrals for free and reduced-cost computer hardware, software, training courses, and technology consulting services. They distribute to nonprofits new IBM computer hardware and tech planning assistance through grants. They also offer low-cost computer training courses in Denver, Boulder, and Colorado Springs. They have distributed more than \$600,000 worth of new IBM computer hardware to Colorado nonprofits through their TechLaunch grant. For more information on making a contribution or volunteering please visit www.t4tcolorado.org

BUILDING YOUR LEGACY

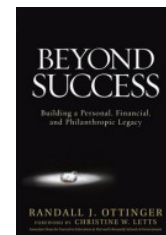


Last month's issue discussed building your legacy based on your family's traditions and history. This month we will discuss your **personal wishes and values**. The desire for meaning

and genuine connection will always transcend wealth. To be really rich is to be rich in achievement, rich in experience, and rich in friendship. How do you find out what's most important to you? Here are 5 suggestions:

1. Build a plan for self actualization and develop it.
2. Determine your guiding principles - the values you live your life by.
3. Rate your priorities - time, money or relationships.
4. Develop a plan with measurable goals which results in a written legacy you can share with important people in your life.
5. Draft a purposeful trust - a trust with a personality and a voice that will have an impact on your beneficiaries based on your values.

There are many resources that you can go to for guidance with any of these. One book suggestion is: **Beyond Success: Building a Personal, Financial, and Philanthropic Legacy** by Randy Ottinger.



To purchase please visit: www.amazon.com/dp/0071496769?tag=impweaadvltd-20&camp=0&creative=0&linkCode=as1&creativeASIN=0071496769&adid=1MSN121FHCAF0Q80W4N9&

Making an Impact

If you would like any assistance in the 2nd step of building your legacy, please feel free to contact us! Next issue we will discuss further the impact building your legacy will have on your family philanthropy.

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 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.



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!

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.