Michael Garron Hospital Foundation
Professional Advisors Newsletter

November 2024

Hello {First name},

At Michael Garron Hospital Foundation, we’re grateful for the role you play in helping your clients make meaningful gifts that truly improve healthcare in our East Toronto community.

This latest edition of our newsletter includes a special report from Serena Hak, Head of Philanthropy and Senior Associate at CI Private Wealth. You’ll also meet a grateful patient named Josh and his mom, Colleen.

If you have any ideas for future editions of our newsletter, please let me know.

Thank you for everything you do to support our community.
Best wishes,

Laura

P.S. Please save the date. The next Professional Advisors Breakfast takes place at Michael Garron Hospital on Wednesday, May 28, 2025.

Highlights from our reception

In October, 30 professional advisors gathered downtown at CI Financial to network and hear from Serena Hak. Her engaging presentation, “The Convergence of Generosity & Practicality – How Charitable Giving is Good for Your Clients, Your Business & Your Community,” had attendees feeling motivated and informed.
Two key takeaways stood out:

- Clients are 40% more likely to be very satisfied with their advisors when they provide guidance on philanthropic planning.

- The Generosity Conversation creates meaningful relationships, enhancing your business beyond financial returns.

Thank you to everyone who attended!

Generosity Planning: A special report

As a member of our Professional Advisors Network, you're receiving a new report prepared by Serena Hak.

- **The Generosity Portfolio™** - A unique tool to help clients/donors understand how they are participating in the charitable sector; enabling them to align wealth, values, and impact.
- **Case Studies & Next Steps –** A framework that helps advisors better understand how to incorporate this into their client meeting cycle.
- **The Generosity Conversation & An Advisors Business –** An outline of key metrics that ensure advisors understand the business opportunity before them.

To read the report, click here.

The Power of philanthropy in planning

In your work as a professional advisor, you have the opportunity to guide clients through decisions that shape their financial future and personal legacy.
An advisor from our network recently shared an inspiring story about a client who set up a donor-advised fund (DAF). The client wanted to align their philanthropic planning with their personal values, one of which included healthcare. Over the years, this client had heard their advisor mention the transformative work being done by Michael Garron Hospital. Our hospital's commitment to improving the health of the East Toronto community stood out when it came time to designate beneficiaries of their DAF.
With their advisor's guidance, the client made a generous gift to support the hospital's highest priority, expansion of our cardiac catheterization lab. Our foundation team invited the donor for a tour to show them how their generosity will make an impact. This personal connection deepened the donor's commitment, sparking a meaningful relationship between the client and the hospital.
This story is a testament to the great role you, as advisors, play in shaping not just financial outcomes but human stories. By initiating conversations about philanthropy, you empower your clients to create legacies that reflect their values and passions.

Meet Josh and Colleen

When Josh Turner's body started to crash, he turned to the emergency department in his area. All seemed lost until his mom Colleen Petrick found a unique program at our hospital.
Unable to breathe independently and paralyzed from the neck down, Josh was given only a 2% chance of survival. If he did live, his doctors were sure he'd need a ventilator for the rest of his life. Colleen learned about our prolonged-ventilation weaning program. Within two weeks of being transferred to our care, Josh was breathing on his own again. Specialized care like this is made possible by supporters like you.
For the full story, visit mghf.ca or see our our annual report.

Is the MFA-P for you?

The Master Financial Advisor in Philanthropy (MFA-P) is an increasingly popular designation for professional advisors across Canada.
Have you ever explored this certification? If you would like to learn more, please click here.

Growing our network

Our team looks forward to inviting you to a networking breakfast in May. In the meantime, if there are other professional advisors that you think we should connect with, I'd love to hear from you.
Alternatively, please feel free to forward this newsletter to anyone who may be interested.

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