



# The Advisors' Resource

A PROFESSIONAL ADVISOR RESOURCE TO BENEFIT HEALTH CARE IN OUR REGION

Welcome to the September 2017 issue of the *Advisors' Resource*, Hamilton Health Sciences Foundation's newsletter on Legacy Giving.

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### CRM2 Update

By Mark Barnicutt

Originally published January 20, 2017 on the [HighView Financial Group website](#)

The long anticipated regulation, that will impact Canadian investors, will be on display in many mailboxes and inboxes this month. The Client Relationship Model (Phase II), or more popularly known as CRM2, aims to improve the level of information provided to Canadian investors. More specifically, investors will see what are they paying for the services provided by their financial advisors (or investment institutions) and how well their investments have performed. This basic and necessary information is finally being brought out in to the open by our regulators.

[READ MORE](#)

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### Allied Professional Survey

Hamilton Health Sciences Foundation welcomes your insight and thoughts on how we can enhance our *Advisors' Resource* Newsletter. Please complete the following short, ten-question survey.

[Share your ideas](#)

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### Leave a mark on health care for years to come.

Health care, by its nature, is ever changing. From our knowledge of various illnesses to the technology and equipment used to diagnose and treat patients, what we know now will be expanded and changed in the future.

In support of high quality, patient-centred care, Hamilton Health Sciences Foundation has established the **20BY20 Endowment Campaign** with the goal of building a \$20-million endowment by the year 2020 in support of essential equipment purchases and the funding of research and education. For members of our community it is a personal, powerful and permanent opportunity to support health care now and into the future.

Donating to the **20BY20 Endowment Campaign** is an excellent way for your clients to both enjoy the philanthropic benefits of giving to charity, as well as ensuring quality health care is available for generations to come. Learn more about the **20BY20 Endowment Campaign** through this video or by calling **905-522-3863** or email [legacy@hhsc.ca](mailto:legacy@hhsc.ca).



# 2015 BY 20 ENDOWMENT CAMPAIGN

BE A PART OF CANADA'S LEGACY.



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These legacy gifts support enhanced patient care by funding equipment

or legal advice.  
The Foundation recommends donors who are planning a legacy donation seek legal and/or financial planning advice.

purchases, leading-edge research, education and specialty programs.

Visit [hamiltonhealth.ca/legacy](http://hamiltonhealth.ca/legacy) for more information on our Legacy Giving program.



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