

PROFESSIONAL CHAMPIONS  
OF PHILANTHROPY

## JEREMY HAMPSON CFP, CLU

senior wealth advisor

Assante Capital Management & The Donor Motivation Program, Dorval, QC  
23 years as a wealth advisor, 20 years in charitable planning

## "Touching the soul of the client"

When placing philanthropy into the context of his professional life, Jeremy tells a personal story of his family's journey after his younger sister was diagnosed as brain injured and handicapped. They turned to community nonprofits for support, which led to a lifelong commitment by the entire family. "As a teenager I started volunteering to help out with activities and fundraising, and as I moved into my career as a financial advisor I started realizing that I had a lot of expertise in this area, and that I could give back to those same nonprofits. And here I am some 20 years later, still sitting on Boards and fundraising, and it really is a part of my life."

Jeremy's insider knowledge of nonprofits helps him relate the difficulties these organizations have in raising funds and how much is accomplished with very little. "It actually blows me away every single year, with the charity I support, when I'm working through the annual budget, what they are able to do. I tell my clients that its more than just about tax strategies, dollars and overhead: its about the impact charities make on lives." He finds when he focuses on impact, his clients light up. "What I find is that this almost touches their souls."

While business revenue generation for his practice was not his primary motivation for incorporating philanthropy in his practice, he has found that he has benefited over the years. "All of a sudden I found that people are a lot more open to purchasing different types of products, mainly insurance policies." Jeremy also points to other benefits such as the deeper relationships he has developed with clients, and to the defensive nature of offering philanthropic services: "If I'm not talking to them about it, someone else probably will, and as opposed to me making money I'm actually at the risk of losing a client." In addition, philanthropy has helped Jeremy to establish a niche in a competitive environment. "If you understand tax and you understand philanthropy today, you're in the minority. That really gives you a competitive advantage on the business side of things, and the open doors to clients who are very well-heeled. So that is definitely good for business. It's a way to differentiate yourself from everyone else out there."

