

PATTI DOLAN

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portfolio manager

SAGE Connected Investing, Raymond James Ltd, Calgary, AB
31 years in profession, 10 years in charitable planning

“Business as a lifestyle”

Responsible investing is the focus of Patti’s business, so there is a natural alignment of her clients’ values and investment. The SAGE Connected Investing team donates 10% of profits back to the community, their advisors are involved in the community, and everything that they do has a focus on philanthropy. “Our clients know that money has an end result and so the conversation about philanthropy just naturally progresses as a part of responsible investing. My clients are attracted to our team for this specific reason. When we set up our first meeting we have an agenda, and as part of that initial meeting we introduce the concept of philanthropy. There are all sorts of different conversations that we’re having that make philanthropy part of what we do when we’re talking to a client.”

Since the advisory team is dealing with individual values, the conversations that they have with clients go very deep, and often they are dealing with generational wealth. “There is definitely the technical side to all that we do but it’s the soft side that builds relationships and you end up with what I call a ‘sticky’ business. In a lot of cases, with my HNW clients, I have 3 generations of the wealth; this shows you the staying power.”

Donor advised funds are one of the giving vehicles that the advisory team uses, but with a difference: they manage the funds within the foundation using responsible investing, and here again this aligns with the client’s values “so its kind of a double bonus for them.”

This attraction of clients based on values has had a powerful effect on the team’s business. “The team is very much involved in the community so we walk our talk. From there it’s a natural extension; we are very much involved on boards of nonprofits and the business grows from there too. We have attracted very like-minded people and the foundations refer each other as well. While it is definitely a business, its also a lifestyle”.

Patti assures me that they have worked hard to achieve their goals, and that they don’t take success for granted. But she also stresses how much fun she has going into the office each day. “Its really interesting how it has unfolded on a referral basis, so it is as if there is a telegraph system out there. There is that connection that is happening. Its hard to explain, it just happens in a magical way.”

