

ANDERSON

WEALTH MANAGEMENT GROUP

of Wells Fargo Advisors

Making a difference: Unusual ways to give back

Imagine volunteering with a sea turtle conservation project and experiencing the excitement of watching sea turtle hatchlings emerge from their sandy nests and make their way to the open ocean. Or working with climate scientists in the Arctic as you help monitor snowpack, permafrost, and soil samples for signs of climate change.

These are just two examples of how you could make a difference in ways you may not have thought about before — and have a remarkable experience as you do so.

Here are four unique ideas for how to give back. They could help inspire you to take action and help make the world a better place.

Help critically endangered turtles

Volunteer vacations can offer upscale travel in exotic locales while giving you a chance to make a difference. One example is traveling with GVI to Costa Rica's Tortuguero National Park to help in conservation efforts for critically endangered turtles including hawksbills, green sea turtles, and leatherbacks. Part of your volunteer work includes developing key research skills while monitoring Costa Rica's Caribbean coast for mother turtle tracks and nests.

Help detect signs of climate change in the Arctic

Looking for the road less traveled? How about traveling to research sites on a sled pulled by a snowmobile? Earthwatch Institute offers opportunities away from the usual tourist hotspots, including looking for signs of global warming in the Arctic. (You might also get a chance to sleep in an igloo.) Pairing volunteers with scientists, the organization runs trips around the world to contribute to important research.

Make a difference near home

You can also give back in distinctive ways without hopping on a plane. If you have stock, real estate, or collectibles that have appreciated, you might consider donating those non-cash assets through a donor-advised fund.

A donor-advised fund can be used for cash gifts; however, it can also be especially helpful for making non-cash gifts easier to handle for both the giver and the recipient. Many charities may be unable to take non-cash gifts given the level of complexity of such donations, so donor-advised funds can help charities you want to support benefit from the wealth accumulated in your non-cash, appreciated assets.

Using a donor-advised fund also offers givers a middle ground between simple “checkbook charity” and complex giving like launching a nonprofit foundation. Through your donor-advised fund, you can access more sophisticated planned giving methods without a long-term administrative commitment.

Invest in companies that align with your cause

What if investments could positively impact your finances and the causes you care about the most? You might be interested in social impact investing, which focuses on companies that do good in the world. It may mean investing in businesses that have the foresight to address serious issues that present an opportunity to turn a profit for years to come. Social impact investing may also mean seeking out companies that are proactive and adapting to challenges that may lie ahead, whether it’s next year or 10 years down the road.

There are many ways to practice social impact investing. Here are a few examples:

- Invest directly in companies or organizations whose main goal is benefiting social and environmental causes that align with your values.
- Choose managed investments, such as exchange-traded funds (ETFs) or social impact bonds, that include companies that align with your values.
- Make charitable grants to groups or projects that can blend grant money with investment capital to support higher-risk projects that may not otherwise succeed financially.

A financial advisor could recommend an approach toward social impact investing that might meet your goals.

As always, if you have any questions on this topic or any others, feel free to contact any of us at any time.

We are happy to help.

Tay Jacoby-Fries

Financial Advisor, RICP®

Anderson Wealth Management Group | of Wells Fargo Advisors
California License #0N12781

9755 SW Barnes Road | Suite 295 | Portland, OR 97225
Ph: 971-394-2669 | Fax: 971-394-2664

tay.jacobyfries@wellsfargoadvisors.com
www.andersonwmg.com

Andrew C. Anderson

Financial Advisor

Anderson Wealth Management Group | of Wells Fargo Advisors
California License #0B03182

9755 SW Barnes Road | Suite 295 | Portland, OR 97225
Ph: 971-394-2669 | Fax: 971-394-2664

andrew.anderson@wfadvisors.com
www.andersonwmg.com

Kristin A. Quinn

Senior Registered Client Associate

Anderson Wealth Management Group | of Wells Fargo Advisors
9755 SW Barnes Road | Suite 295 | Portland, OR 97225
Ph: 971-394-2669 | Fax: 971-394-2664

Kristin.Quinn@wfadvisors.com
www.andersonwmg.com

Katy Fackler

Senior Client Associate

Anderson Wealth Management Group | of Wells Fargo Advisors
9755 SW Barnes Road | Suite 295 | Portland, OR 97225
Ph: 971-394-2669 | Fax: 971-394-2664

kathleen.fackler@wfadvisors.com
www.andersonwmg.com

This article was written for Wells Fargo Advisors and provided courtesy of Andrew C. Anderson, Financial Advisor and Tay Jacoby-Fries Financial Advisors in Portland, Oregon at 971-394-2669.

Investment and Insurance Products are:

- **Not Insured by the FDIC or Any Federal Government Agency**
- **Not a Deposit or Other Obligation of, or Guaranteed by, the Bank or Any Bank Affiliate**
- **Subject to Investment Risks, Including Possible Loss of the Principal Amount Invested**

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, Member SIPC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

©2017-2021 Wells Fargo Clearing Services, LLC. All rights reserved.

CAR# 0322-01599