

**The disease you've  
never heard of...**



**An investment opportunity to talk about.**



## Socially Responsible Investing

**Echelon Wealth Management**, the independent wealth management and capital markets advisors, are delighted to offer investors the opportunity to transact charitable securities donations via two unique (Long and Short Term) socially responsible charitable investment funds. These funds provide participants with a number of significant tax advantages combined with the knowledge that they are helping in the fight against childhood cancer;

**Fund ‘A’:** Long Term Fund

**Find ‘B’:** Short Term Fund

### Benefits

**Make a bigger impact donating securities directly:**

Eliminate capital gains tax by donating securities directly to the WCF (rather than selling them and donating the proceeds to deliver a greater charitable tax credit for you and more funds to the WCF to fight childhood cancer).

**Why donate securities:**

Your gift of securities entitles you to a **donation receipt for the full market value** (resale) of your contribution. Your gift will result in a non-refundable tax credit that will reduce your income taxes. You can use it in the year of your gift or carry it forward for up to five additional years.

**Pay no capital gains tax:**

Donating securities directly to WCF avoids capital gains tax on the appreciated value (increased price) of your securities, maximizes the return on your investment and protects the tax credits for use against other taxable income.

The chart below shows the tax advantage when you donate shares to WCF instead of selling them and donating the proceeds. This calculation assumes a marginal tax rate of 50%.

Fig.1 (Wilms Cancer Foundation; Securities Donations Schematic)

Sell Shares & Donate Cash		Donate Shares Directly	
Fair Market Value	\$10,000	\$10,000	\$10,000
Cost Basis	\$2,000	\$2,000	\$2,000
Capital Gain	\$8,000	\$8,000	\$8,000
Taxable Gain	\$4,000 (50%)	\$0	\$0
Tax Credit (assuming 25% of donation value)	\$2,500	\$2,500	\$2,500
Tax on Capital Gain (at 50%)	\$2,000	\$0	\$0
<b>Tax Savings</b>	<b><u>\$500</u></b>	<b><u>\$2,500</u></b>	

Advocacy **Early Detection** Education  
 Fundraising Grants **Treatment** Support



## Who are the WCF

Wilms Cancer Foundation, is a charitable organization that supports and represent the needs of children, families and healthcare organizations affected by the childhood kidney cancer nephroblastoma (commonly known as 'Wilms').



## What is 'Wilms'

Wilms is the most common childhood kidney cancer and the 4<sup>th</sup> most common paediatric cancer overall with about 1:10,000 children diagnosed each year in North America. The tumour grows on the kidney and can begin while the child is in the womb. The tumour can become much bigger than the kidney itself and the most common symptom is a sudden swollen stomach. Ultimately both usually require removal. The disease has a good survival rate if detected early but if diagnosed late the cancer can be fatal, spreading to the lungs, liver or bones. Sadly, many children like William go undiagnosed for years and require extensive, life-threatening treatment including chemo & radiation therapy and surgery over many months or even years.

## Every Parent's Nightmare

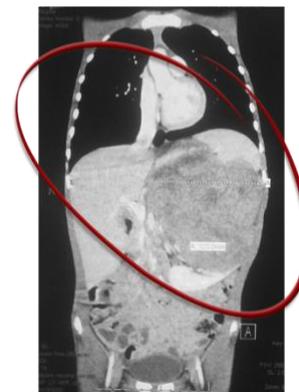
Complaining of nothing more than a 'tummy ache', William was diagnosed, out-of-the-blue, with stage 4/5 Wilms cancer at just 7yrs. old. An active little boy (football, swimming, etc.) tests discovered a massive tumour on his kidney and a further nine in his lungs. His 'late diagnosis' lead to over 3 years of intense and protracted chemo & radiation therapy, multiple lifesaving operations, 2 relapses and finally a bone marrow/ stem-cell transplant in an attempt to beat the disease. Although currently clear William (now 11yrs.) has exhausted all treatment options and his life still hangs in the balance.

Importantly, 'early diagnosis' would have prevented this pain, stress and heartache (as well as the unnecessary strains on our healthcare system).

Wilms Tumor Staging: 5yr. Survival Rate					(Diffuse Anaplastic)
Stage	Stage I	Stage II	Stage III	Stage VI	Stage V
Survival %	75-80%	80-85%	50-70%	30-45%	65-70%

## Objective

The foundations objective is to establish a national program of awareness, education, advocacy, early detection and treatment to tackle the spread of this devastating cancer and to ensure that children, like William, and his family are not faced with the same life-threatening situations. The WCF also seek to support children, families and organizations as they tackle Wilms through initiatives such as their 'Dream-Making' program, which provides financial support to lighten the emotional and financial burden they face at time of crisis. Children like William (and his family) should never have to face the ordeals that he has been confronted with at such a young age and, importantly, they don't need to.



Online Donations: [www.WilmsFoundation.org](http://www.WilmsFoundation.org)  
 Telephone: +1 (778) 514 5000  
 email: [info@WilmsFoundation.org](mailto:info@WilmsFoundation.org)

Advocacy **Early Detection** Education  
 Fundraising Grants **Treatment** Support



## Summary (By the Numbers):

- #1 childhood kidney cancer;
- 4<sup>th</sup> most common childhood cancer;
- 7/100 childhood cancers are Wilms;
- 9/10 of all childhood kidney cancers are Wilms;
- 1/10,000 are at risk from Wilms;
- 600-700 new cases of Wilms in North America per yr.;
- 55% of children are diagnosed at stage 2/5 (after the cancer has spread);
- 15% of those are diagnosed at stage 4/5.
- 7,500 children suffer Wilms in North America per yr.;
- 190,000 children diagnosed with Wilms worldwide per yr.;
- 30-45% survival rate of 'diffuse anaplastic' Wilms;
- \$100 cost of early detection cost of Wilms (one-time);
- \$833,000 cost of late detection Wilms treatment (per yr.);
- \$700 more to treat childhood cancer than adults (per day);
- 14.6% of all medical bankruptcies due to childhood illness

---

Advocacy **Early Detection** Education  
Fundraising Grants **Treatment** Support



Advocacy **Early Detection** Education  
Fundraising Grants **Treatment** Support

# ECH<sup>≡</sup>ELON

WEALTH PARTNERS INC.



Regulated by  
Investment Industry Regulatory  
Organization of Canada



Echelon Wealth Management are an independent wealth management and capital markets advisors known for our client-centered approach and entrepreneurial spirit. Echelon Wealth Partners is a member of both the Investment Industry Regulatory Organization of Canada (IIROC) and the Canadian Investor Protection Fund (CIPF).

## Wilms Cancer Foundation™



Wilms Cancer Foundation Literature: 'Echelon Charitable Securities Donations'

This Operations Literature is intended to provide supplementary information and is intended for 'internal and permissible use' only. Further information and/ or additional copies can be obtained by contacting the Wilms Cancer Foundation™:

Telephone: +1 (778) 514 5000

e-mail: [info@wilmsfoundation.org](mailto:info@wilmsfoundation.org)

Web: [www.WilmsFoundation.org](http://www.WilmsFoundation.org)

Address: Wilms Cancer Foundation™: 2486 Gammon Road, Naramata, British Columbia, Canada, V0H 1N1,

™© THE WILMS CANCER FOUNDATION, WCF AND THE SLOGANS: "DEFEATING CHILDHOOD KIDNEY CANCER" AND "CANCER... BEAT IT" ARE THE INTERNATIONAL TRADEMARKS OF THE WILMS CANCER FOUNDATION. AND ARE PROTECTED BY COPYRIGHT.

DOCUMENT CONTENT AND DESIGN BY THE WILMS CANCER FOUNDATION © COPYRIGHT ALL RIGHTS RESERVED.

Under the copyright laws this documentation may not be copied, photocopied, reproduced, or translated, in whole or in part, without the prior written consent of the Wilms Cancer Foundation.

Canada: Registered Charity: 756261939 BC0001 / USA: Qualified 501(c)(3) Tax-Exempt Organization | EIN:98-1563988

© COPYRIGHT | WILMS CANCER FOUNDATION | ALL RIGHTS RESERVED.