

ASK AN EXPERT

# GIVING STRATEGICALLY



## TIPS TO MAKE PHILANTHROPY WORK FOR YOU

**With 25 years in the investment industry, Pamela Yoon knows it can be difficult to plan strategically when making a donation.**

“A lot of times, giving can be reactionary or sporadic,” says Yoon, an SFU alumna and RBC Dominion Securities Senior Portfolio Manager. Yoon is no stranger to giving back herself, from founding the Pamela Yoon Award at SFU for economics students to participating on boards of the SFU Alumni Association, the FCSI National Council and the Tesla Owners Club of B.C.

Having managed the wealth of high-net-worth clients for more than 25 years, Yoon especially sees giving as a part of what she calls a “bigger wealth management story.” She says that giving strategically helps people not only retain the most of their investments and earnings—it plays a big part in deepening family connections and leaving a long-lasting, meaningful legacy for generations to come.

Yoon has shared her best tips to help you make the most out of your next gift.