

Malcolm D. Burrows Head, Philanthropic Advisory Services

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Background and Experience

Malcolm is a philanthropic planner and advisor to private clients and leads Canada's largest national private foundation business. He joined the Scotiabank Group® in 2004 after spending 13 years with three major Toronto charities.

Malcolm obtained his Bachelor of Arts Degree from the University of Toronto. He is active in the charitable sector as a speaker, writer and he is frequently quoted by the media. He is Course Director for the Canadian Association of Gift Planners' *Canadian Gift Planning*, the longest running course in Canadian philanthropy. As past-chair and member of the Government Relations Committee of the Canadian Association of Gift Planners he has contributed to the development of new charitable tax incentives, including the elimination of capital gains on gifts of public securities.

Malcolm is the editor-at-large for the monthly newsletter *Gift Planning in Canada*, member of the editorial committee of the quarterly journal *The Philanthropist*, and author for the C.D. Howe Institute on charitable tax policy. He was instrumental in the creation of *Charitable Options*, a category of stock options approved by the Toronto Stock Exchange.

Business Approach

Scotia Private Client Group is a highly customized and comprehensive group of related services, including private banking, estate and trust, and a broad range of investment services. Through a dedicated Relationship Manager, clients will receive objective advice and financial solutions tailored to their personal situation. Experts in their own right, these managers are supported by a team of specialists centred on clients' financial priorities.

Services Provided

The Scotia Private Client Group Financial Consultant is the initial client contact. The Financial Consultant assesses the needs, recommends the services and introduces the Relationship Manager, the individual best suited to the client's needs. Scotia Private Client Group specialists are a part of the Scotiabank Group® worldwide network, which provides financial solutions and individual attention for clients across the country and around the globe.

