



How can I
recommend
charity without
recommending
a charity?

Talk to your clients
about giving through
their local community
foundation.

It's a delicate dilemma. Estate planners, financial planners, and other professional advisors are often faced with a delicate dilemma: You want to discuss the many benefits of charitable giving with your clients, but you want to avoid recommending specific charitable causes or organizations.

Fortunately, there's a simple solution. It's your local community foundation. A community foundation is a single, trusted vehicle your clients can use to address the issues they care about most, while gaining maximum tax benefit under state and federal law. We offer a variety of giving options – including the ability to set up a charitable fund in your client's name. It's just one way we can help you help your clients achieve their charitable goals.



Looking Forward. Giving Back.

Is giving through a community foundation right for your clients?

Seven questions for estate and financial advisors:

1. Do I have clients who care deeply about their local community?
2. Do they give to more than one charitable cause?
3. Are they interested in creating a personal or family legacy in their community?
4. Are they considering the creation of a private foundation, but concerned about cost and administrative complexity?
5. Would they like to stay personally involved in the use of their gift dollars?
6. Do they want to receive maximum tax benefit for their charitable contributions under federal law?
7. Do they place a priority on sound financial management of their contributions.

If you answered yes to any of these questions, your clients would benefit from knowing more about their local community foundation. We'd be happy to help you make an introduction.

Community foundations are a resource that enables people to be charitable in a very personal way.



ESTATE PLANNING
ATTORNEY

Think of the community foundation as your personal planned giving center

Community foundations have earned the trust of thousands of professional advisors throughout the United States. We work through advisors to enhance the service clients seek from you and your firm – always respecting and working within the relationship you have developed and lead with your clients.

Community foundations can provide a single point of contact for all of an advisor's charitable planning needs: we're a convenient, professional resource that helps you do more for your clients.

Our motivation is simple: Community foundations are nonprofit public corporations organized to help people give effectively to improve quality of life. Our business is community philanthropy.

Everyone wins when we assist advisors who seek to help clients benefit themselves and their communities through effective charitable giving.

There's so much we'd like you to know. Your community foundation provides personalized service and a variety of giving vehicles. We welcome the opportunity to work with you and your advisor to fulfill unique charitable objectives. This story represents a composite illustration drawn from the actual stories of many of the thousands of people who give through their community foundations.