

## ADVISOR TOOLS

# Listening for charitable opportunities

Helping your clients achieve their **charitable goals**.



**Philanthropy is a very personal decision.** A professional advisor can help clients realize their charitable objectives by listening for charitable giving opportunities, explaining options, and suggesting solutions. Significant giving opportunities often arise when clients are making major business, personal, and financial decisions. Our staff can work with you and your client to recommend the best charitable solution. Following are some typical scenarios:

**Year-end tax planning.** Your client just earned a large bonus and wants to give a portion back to the community, but has no time to decide on the most deserving charities. Recommend establishing a Donor Advised Fund through their community foundation for an immediate tax deduction, and the ability to stay involved in recommending uses for the gift for years to come.

**Preserving an estate.** Estate planning identifies significant taxes going to the IRS, but your client wants to direct dollars for local benefit. The community foundation can work with you and your client to reduce his/her taxable estate through a charitable bequest or other planned gift. Your client's gift will create a legacy of caring in the community that stays true to his/her charitable intent forever.

(CONTINUED ON REVERSE)

## Planning charitable giving

Many clients want their professional advisors to help them plan charitable giving. Your community foundation can work with you to answer these questions and help each client fulfill his/her charitable goals.

- What are your client's personal motivations for charitable giving?
- What are your client's charitable interests in the community?
- What are your client's priorities when focusing on a few areas may make the greatest impact?
- What level of involvement does your client want to have in identifying charitable uses for his/her gift?
- What type of giving instrument best fits your client's financial situation and tax status?



Four County

community foundation

For good. For ever.™

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