SERVICES FOR PROFESSIONAL ADVISORS

At Community Foundation Serving Western Virginia Inc., we appreciate the role that you, as your clients' professional advisor and trusted confidant, play in assisting clients with philanthropic interests.

What the Community Foundation can do for you and your clients:

- Offer a knowledgeable and accountable charitable platform for immediate and longer term charitable giving.
- Provide a variety of current and legacy fund options: general charitable giving through donor advised funds, funds for specific areas of interest such as education, arts, or the environment, funds designating specific organizations, scholarship or memorial funds, and services for and/or alternatives to private foundations (including terminations).
- Accept donations of complex, non-cash assets such as real estate, closely-held stock, partnership interests, art and other tangible personal property, and life insurance as well as cash and appreciated assets, including mutual fund shares.
- Assist your clients wishing to create a platform for family philanthropy or seeking gift-making guidance or charitable organization research and information.
- Help you and your clients determine the most tax-effective current or planned gift.
- Steward your clients' charitable legacy into the future and serve as a buffer against nonprofit uncertainty.

What you can do to encourage your clients' philanthropy:

Ask your clients about their charitable goals during the financial and estate planning process. They want you to start the conversation! We suggest beginning with these questions:

- Do you have charities that you support on an annual basis? If so, why, what do they have in common and/or why are they meaningful to you?
- If not, is there someone or something that has made a difference in your life? Would you like to make a similar difference for others, now or in the future?
- Would you like to make a meaningful impact on the causes that are important to you and your family in your financial or estate plans?
- If I could show you how to shift tax dollars to charitable dollars through your planning, would you be interested in learning more?

We're here to help!

Whether your client is interested in tax-effective and convenient options for current giving or in creating a perpetual charitable legacy, we encourage you to involve The Community Foundation in the planning process. We will be happy to brainstorm with you and/or your client about how a gift might be structured to best achieve your client's charitable goals, with no obligation and while always respecting your relationship with your client and your client's confidentiality.

FOR MORE INFORMATION, PLEASE CONTACT:

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COMMUNITY FOUNDATION
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