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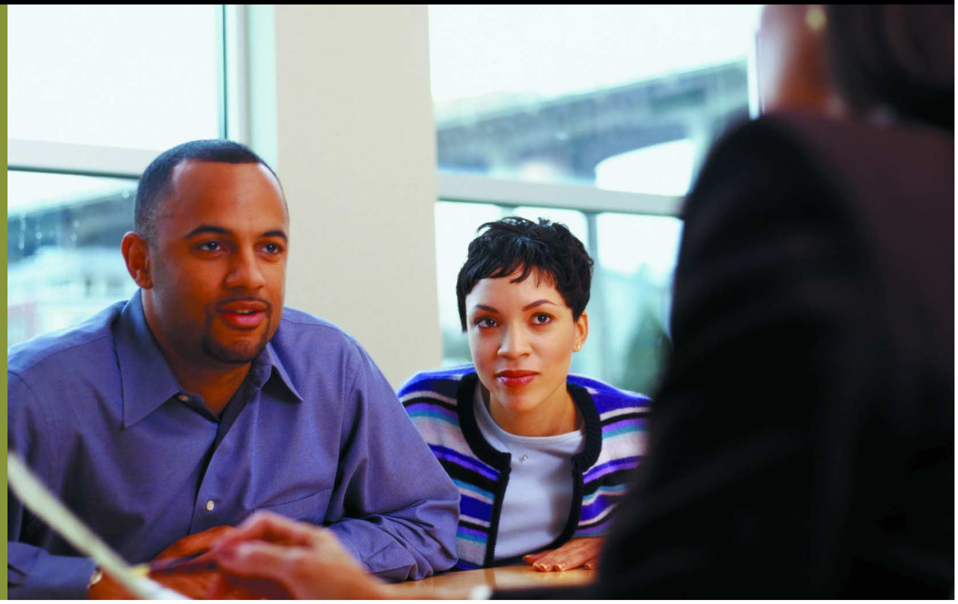
Giving advice on charitable giving

Professional advisors and community foundations **working together** for clients and community.



Professional advisors find themselves *at the convergence point of two dramatic forces in society today: the enormous increase in personal wealth and the renewed concern for community.*

Despite recent setbacks in the stock market and our economy at large, the number of households with investable assets of $500,000 or more will rise from 11.2 million to 33.5 million from 1995 to 2005, respectively.

At the same time, people from all economic backgrounds are giving back to community in record numbers. Community-based philanthropy is in the front ranks of this movement. In 2000, total annual gifts to community foundations increased to over $4 billion — a 13 percent increase since 1999.

These trends are affecting professional advisor practices in two significant ways. First, advisors are incorporating charitable giving as an integral component in their financial and estate planning activities — including the question "do you have charitable giving interests?" is standard planning practice for many advisors today. Charitable giving advice is a value-adding element in an advisor's portfolio and a service welcomed by clients who expect an integrated approach to their wealth management. Second, advisors are incorporating community foundations as trusted resources in delivering charitable giving knowledge and products to their clients.

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Here are ways that we can help

Community foundations can support you and your clients at every step in the charitable giving process. We can help you:

- Identify your clients' charitable giving interests and motivations
- Match personal charitable interests with tax planning needs
- Create and implement charitable plans that are integrated into major business, personal and financial decisions
- Facilitate complex forms of giving and execute technical giving instruments (such as charitable remainder trusts)
- Provide information on community needs — and on the local agencies and programs that make a difference in the areas your clients care about most
- Deliver grantmaking expertise and a range of administrative services related to charitable giving

Michigan community foundations℠

For **good.** For **ever.**℠

Contact your local community foundation today.
*To find the community foundation in your area, visit **www.forgoodforever.org.***

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.

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

Estate Planning Attorney

Community foundations are a resource for advisors. Attorneys, CPAs, financial planners, brokers, insurance agents, and other professional advisors are turning to community foundations to help enrich the charitable giving strategies of their clients. Here's why:

- Community foundations are *neutral experts* with technical information on a range of planned giving options — from executing gifts of real estate, stock, or personal property to establishing donor advised funds or income-producing charitable annuities. Community foundations help advisors provide their clients with the best charitable giving strategies based on each client's unique financial situation, tax status, and giving goals.
- Community foundations have *in-depth information* on local needs and nonprofit organizations. When clients ask, "how can I make sure my charitable gifts will make a difference?," many advisors turn to community foundations for information on the programs and agencies that are working effectively in the specific arenas interesting each client. Community foundations are in touch with local organizations and activities addressing the broad spectrum of community needs — ranging from the environment, arts, education, and economic development to special programs for youth, family, and seniors.
- Community foundations serve as the *vehicle for giving* many advisors seek for their clients. For example, community foundations can establish Donor Advised Funds — the very popular mechanism through which a client can make a charitable gift and stay personally involved in suggesting uses for that gift over time. Community foundations are frequently named in bequests as stewards for estate assets that a client wishes to direct to address specific areas of community need in perpetuity. Giving through a community foundation also provides a client time and resources for evaluating potential grant recipients, as well as the ability to give to multiple charities with a single gift.

***There's so much more we'd like you to know.** Your community foundation can help you help your clients achieve their charitable giving goals. We welcome the opportunity to work with you.*