

# GIVING ADVICE

## ABOUT CHARITABLE OPPORTUNITIES



FOR GOOD.  
FOR IOWA.  
FOR EVER.

*Professional advisors and Iowa Community Foundations*

### WORKING TOGETHER FOR THEIR CLIENTS & THEIR COMMUNITIES

Professional advisors find themselves at the convergence of trying to assist their clients in managing and preserving their wealth while also assisting them with their desires to give back and leave a legacy in their community. Balancing these two priorities are affecting professional advisor practices in two significant ways:



**CHARITABLE  
GIVING ADVICE**

FIRST, advisors are incorporating charitable giving as an integral component in their financial and estate planning activities. Asking the question, **“Do you have charitable giving interests?”** is a standard planning practice for many advisors today. Charitable giving advice is a service welcomed by clients who expect an integrated approach to their wealth management.



**TRUSTED  
RESOURCE**

SECOND, advisors are incorporating community foundations as **trusted resources** in delivering charitable giving knowledge, maximum tax benefits and various products to their clients.

*Iowa community foundations can support advisors and their clients through the charitable giving process. Here's how:*

- 1** IDENTIFY your client's charitable giving interests
- 2** MATCH personal charitable interests with tax planning needs
- 3** CREATE AND IMPLEMENT charitable plans that are integrated into major business, personal and financial decisions
- 4** FACILITATE complex forms of giving instruments (such as charitable remainder trusts)
- 5** PROVIDE information on community needs highlighting local agencies and programs that make a difference in the areas that clients care about most
- 6** DELIVER grantmaking expertise and a range of administrative services related to charitable giving
- 7** SUPPORT ongoing and emerging charitable conversations with your clients



THINK OF YOUR  
LOCAL COMMUNITY  
FOUNDATION AS  
YOUR PERSONAL

## PLANNED GIVING

DESIGN CENTER

- **We have earned the trust of hundreds** of professional advisors throughout Iowa. Community foundations work through advisors to enhance their client services. We respect and work within the relationship you have developed with your clients.
- **We provide a single point of contact** for all of your client's charitable planning needs. Community foundations are a convenient professional resource that helps you do more for your clients.
- **Our motivation is simple.** Community Foundations are nonprofit organizations created to help people give effectively to improve quality of life for those in need. Our business is community philanthropy.
- **Everyone wins** when we assist you in helping your clients benefit themselves and their communities through effective charitable giving.

## A TRUSTED RESOURCE FOR ADVISORS

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



### LOCAL RESOURCES

Community Foundations have 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.



### IN-DEPTH INFORMANTS

Community foundations have detailed information about local needs and nonprofit organizations. When clients ask, "**How can I make sure my charitable gifts will make a difference?**" many advisors turn to us for information on programs and agencies that are working effectively in the specific areas that interest their clients.

Community foundations are in touch with local organizations and programs addressing the broad spectrum of community needs ranging from the environment, arts, education and economic development to special programs for youth, family and seniors.



### VEHICLES FOR GIVING

Community foundations serve as the connection to giving opportunities many advisors seek for their clients. For example:

- We can establish a donor-advised fund. This is a very popular mechanism through which a client can make a charitable gift and stay personally involved in suggesting uses for that gift over time.
- We are frequently named in bequests as stewards for the estate assets that a client wishes to direct in order 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.



FOR GOOD.  
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Gifts may be eligible for the Endow Iowa tax credit.  
Contact your local community foundation to learn more.

[www.IowaCommunityFoundations.org](http://www.IowaCommunityFoundations.org)