The Community Foundation

Your ally in giving.

Your clients trust you because you are an expert. You can trust us for the same reason. Since 1997, we have helped many individuals in Weld County make the most of their charitable giving because we are experts in philanthropy. And we want to partner with you to help your clients meet their charitable goals.

How We Do It

The Community Foundation Serving Greeley and Weld County offers everything you need to talk to your clients about philanthropy. From continuing education to types of giving options, we help you stay current on giving trends, benefits, issues and opportunities.

And when you are ready to create a charitable trust or fund for your client, turn to us. With our maximum tax advantages and expert planning and grantmaking services, we can help your clients save more, learn more and do more with their charitable dollars.

Making philanthropy and its benefits available to all.

Resources For You

- On-line access to information on charitable giving.
- Updates on tax law changes.
- Presentations on estate and charitable planning.
- Topical handouts to answer your clients' questions.
- Professional advisor seminars on relevant topics related to charitable giving.

Benefits For Your Clients

- A range of charitable giving vehicles, including Donor-Advised Funds, Charitable Trusts and Charitable Gift Annuities.
- Maximum charitable tax advantages.
- Community knowledge and leadership.
- Grants to charities throughout the United States.

The Community Foundation
GREELEY AND WELD COUNTY

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The Community Foundation Serving Greeley and Weld County

Talking About Philanthropy

Tips for professional advisors

Talk About Philanthropy

Appreciate the value of giving.

Chances are, your clients give. They already donate generously to their favorite causes in the community and around the world. As a professional advisor, you can help them streamline their giving and enjoy greater tax advantages. The Community Foundation can help you do so.

Attorneys, financial advisors and accounting professionals are increasingly offering charitable planning advice. Shouldn't you be the first person your clients turn to for help?

Why

- Your competitors do.
- You'll save your clients money.
- It's good for the community.

Timing, Timing, timing.

Each change in your client's financial or family circumstances can be an opportunity to talk about philanthropy. By creating a charitable fund or trust, you can help your clients avoid capital gains taxes, leave more of their estate to their children and benefit the community.

We can help you identify and seize opportunities to save your clients money and plan their charitable legacy. We work in partnership with you to help you meet your clients' financial *and* charitable goals.

When

- Retirement or estate planning.
- Sale of a business.
- Stock sale or appreciation.

We make you look good.

Professional advisors often feel uncomfortable broaching the subject of philanthropy. Yet survey after survey shows their clients wish they would.

Charitable planning requires the same steps as any financials or estate plan: asking questions, offering choices and handling the details. We can provide you with the tools and information you need to answer your clients' every question.

How

- Ask questions.
- Learn more.
- Trust us.