Should your clients give through their community foundation?

Estate and financial advisors can consider these three reasons.

We help people connect to the causes they care about most. When your clients give through their community foundation, they…

Receive personalized service. We work closely with you and your clients to develop a giving approach that matches their personal interests and tax planning needs. We can help integrate charitable giving within estate and financial plans, establish Donor Advised Funds named for your clients, facilitate anonymous giving, and assist with even the most complex gift instruments.

Gain local expertise. Our professional program staff monitors all areas of community need—including human services, education, the environment, healthcare, the arts, and economic development. We can help your clients learn more about local agencies and programs that make a difference in the areas they care about most.

Support community leadership. We invest in the long term and bring people and organizations together, convening diverse voices to address local issues and opportunities. Our business is building community.