



How can I
recommend
charity without
recommending
a *charity*?

Talk to your clients
about giving through
their local community
foundation

It's a delicate dilemma. Estate planners, financial planners, and other professional advisors are often faced with the same challenge: You want to discuss the many benefits of charitable giving with your clients, but you want to avoid recommending specific charitable causes or organizations.

Fortunately, there's a simple solution. It's your local community foundation. A community foundation is a single, trusted vehicle your clients can use to address the issues they care about most, while taking advantage of maximum tax benefits under federal law. We offer a variety of giving options — including the ability to set up a charitable fund in your client's name. It's just one way we can help you help your clients achieve their charitable goals.