

## **Professional Service Providers**

If you are a lawyer, accountant, financial planner, investment advisor, or have a specific interest in the technical aspects of planned giving, we hope that you will consider working in partnership with the Community Foundation, in order to help your clients fulfil their financial and charitable goals.

The Community Foundation offers personal, professional and cost effective help to guarantee that giving to charity is a rewarding and enjoyable experience.

We can help you approach the subject of philanthropy and combine our expertise with yours to ensure your client makes the right decisions selected from a full spectrum of options.

### **Key Points for your clients**

- The Community Foundation offers a flexible, quick and easy alternative to setting up a charitable trust
- A Named Fund can be set up in a one hour meeting
- We award grants in the donors' name and arrange publicity if desired
- We target money to charitable groups by issue or geographic area
- A Fund at the Community Foundation is ideal for people who want to support local causes
- We can manage existing charitable grant making trusts by recreating them as a Fund within the Community Foundation
- We can help your business clients achieve their Corporate Social Responsibilities by establishing a corporate giving Fund
- Personal donor support where we deal with all aspects of administration and investment management

### **Getting the Timing Right**

Each change in your clients financial or family circumstances is an opportunity to talk about philanthropy. We believe key opportunities for presenting charitable options include:

- Utilising the availability of disposable income
- Financial planning or investment strategy review
- Realisation or maturity of an investment
- Disposing of property or shares
- Disposing of a business
- Inheritance tax, estate and will planning
- Planning for and at the time of retirement

Giving through the Community Foundation is both enjoyable and rewarding. Your clients can see how their gift makes a difference.