Professional Advisors and The Community Foundation
A Valued Partnership

The Community Foundation values our relationships with all members of the Professional Advisors Community. In fact, more than 80% of our donors are referred to us by one or more of their professional advisors. **We offer support and solutions that help professional advisors provide quality service to their clients by linking those clients to effective charitable options.**

The Community Foundation staff are knowledgeable in all aspects of philanthropy, including family philanthropy. We work with professional advisors, helping their clients achieve charitable goals, such as offering vehicles to give immediately and or through estate bequests. We identify the issues - both critical and ongoing – impacting our region and the nonprofit organizations addressing those issues. For donors, we make giving easy and flexible, providing personalized services through our knowledge of county programs.

Connecting your clients and their philanthropic interests

Resources for Professional Advisors
We offer a wide variety of philanthropic planning resources specifically designed for professional advisors.

- **We are here to answer any questions** you may have; not just about The Community Foundation, but about any issue involving community needs.
- **We will honor and serve your clients' charitable intent:** We offer a variety of vehicles including donor-advised funds, scholarship funds, field of interest funds, agency funds, testamentary funds and bequests, memorial funds, and planned giving options, such as Charitable Remainder Trusts or Charitable Gift Annuities. While we do not give tax or legal advice, we are available to discuss planning ideas and can offer resources that will help you design the best solutions for your client's needs.
- **We understand that every charitable client's goals are unique:** The Foundation is capable of handling gifts of cash, marketable securities, real estate, life insurance, retirement plans, and other tax-deductible gifts.
- **Professional Firm Presentations:** The Foundation is available to conduct presentations for area professional advising firms on a variety of charitable planning topics.
- **Public Speaking:** The Foundation's expert staff is available to speak to professional and civic groups on issues related to philanthropy, including such topics as developing a "giving plan" based on client's values and areas of interest, and current trends in philanthropy.

How to begin a client discussion on charitable planning
Professional advisors often ask for our advice on how to encourage a discussion about charitable giving with their clients.

We suggest asking every client the following questions:

- Are there charitable organizations or causes that you support on an annual basis?
- Would you like to include any of these organizations or causes in your financial or estate plan?
- If there were a way to shift dollars from taxes to charity, would you be interested in exploring those options?

Some follow-up questions to consider are:

- What are the issues, causes, and charities that you feel passionate about?
- How would you prioritize them?
- Which of your past charitable gifts have given you the most satisfaction?
- Given your other commitments, how much time do you have to devote to charity?
- Which level of recognition and visibility interests you?
- To what extent would you like to get your family involved in your giving?
- Would you prefer to give during your lifetime or after your death?
- Which values would you like to pass on to your descendants?
- Would you like to leave a charitable legacy to perpetuate your values?

About Us

Since 1998, The Community Foundation San Luis Obispo County has been a trusted philanthropic resource for our county. We value our partnerships with our local professional advisors and would welcome a conversation.

To access our resources for professional advisors or to discuss how The Community Foundation can help your clients with their philanthropic goals, please contact Donor Services at donorservices@cfsloco.org or call 805-543-2323.

www.cfsloco.org

The Community Foundation has supported our county with grants and scholarships totalin more than $56 million since 1998. The Foundation's assets under management are over $77 million and provide support to all aspects of our community in perpetuity. For more information, please visit The Community Foundation's website at

www.cfsloco.org or call 805-543-2323.