

Your Partner in *Charitable Planning*



Empowering Advisors. Strengthening Community.

Your clients rely on you for trusted financial, legal, and tax guidance. When charitable giving enters the conversation, **The Community Foundation San Luis Obispo County is your partner in simplifying complex gifts, honoring donor intent, and ensuring local impact that lasts for generations.**

We serve as a bridge between donors, advisors, and local nonprofits—connecting generosity to strategic impact through grants, scholarships, and community leadership. Together, we help your clients give wisely, locally, and with lasting impact, whether here in SLO County or beyond.

WHY PARTNER WITH US

EXTEND YOUR EXPERTISE

We support—not replace—your role. You remain your client's trusted advisor while we handle the **charitable details**, from gift acceptance to grantmaking and nonprofit due diligence.

STRENGTHEN RELATIONSHIPS

You're an expert in your field—let us be yours in philanthropy. We help your clients make gifts that are both **tax-smart and personally meaningful**.

MAKE COMPLEX GIVING SIMPLE

From **appreciated stock to charitable trusts**, we simplify even the most complex gifts, ensuring seamless management and maximum impact.

TAP INTO LOCAL KNOWLEDGE

With deep roots in San Luis Obispo County, we understand the region's needs and nonprofits which helps your clients create **lasting change and strategic investments**.

TRUSTED LOCAL PARTNER: Over \$74 million in grants and scholarships awarded since 1998; **\$94 million in charitable assets** stewarded locally.

How to Engage



- 1. RECOGNIZE CHARITABLE OPPORTUNITIES**
Listen for moments in client conversations that signal a charitable strategy could add value — selling a business, a high-income or windfall year, appreciated stock or real estate, legacy or estate planning, or a client who cares about a cause but isn't sure where to make the investment.
- 2. CONNECT WITH US**
We'll meet with you and your client (or just you) to clarify their charitable vision, goals, and timing, whether they're considering a donor-advised fund, an endowed legacy fund, or a planned gift.
- 3. CUSTOMIZE A GIVING PLAN**
Our team develops a tailored strategy that integrates seamlessly with your client's estate or financial plan, maximizing both tax efficiency and impact.
- 4. SIMPLIFY THE PROCESS**
We handle everything from fund set-up and gift acceptance to grantmaking and recordkeeping, freeing you to focus on your core advisory work.
- 5. PARTNER FOR THE LONG TERM**
We provide regular updates, annual fund statements, and continued stewardship, ensuring your client's charitable goals are fulfilled for years to come.

"Participating in the Foundation events and being part of the committee has made me a better estate planning attorney. It's connected me with accomplished professional advisors in our community who generously share their solutions and perspectives. The Foundation is a wonderful resource and partner to planning professionals."

- Lisa A. Lambert, Esq. Law Office of Elisabeth "Lisa" Lambert

LET'S PARTNER FOR IMPACT

donorservices@cfsloco.org | (805) 543-2323

cfsloco.org

EIN: 77-0496500

THE *Community*
FOUNDATION
SAN LUIS OBISPO COUNTY