

PROFESSIONAL ADVISORS

COMMUNITY FOUNDATION
OF NORTH CENTRAL WISCONSIN

Should your clients give through their community foundation?

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

1. 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.

2. 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.

3. 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.

Why should you talk to your clients about charitable giving?

Some advisors are reluctant to begin a charitable giving conversation with their client, and may be concerned about appearing to make a values judgement, especially if the client has not expressed charitable intentions. However, by not broaching the subject of charitable giving, a significant opportunity may be lost for your client and the community. In fact, many individuals expect their professional advisors to bring up the subject if appropriate and assume charitable giving is not an option if the subject is not raised.

SNAPSHOT

7 Questions for Professional Advisors

1. Do I have clients who care deeply about their local community?
2. Do they give to more than one charitable cause?
3. Are they interested in creating a personal or family legacy in their community?
4. Are they considering the creation of a private foundation, but concerned about cost and administrative complexity?
5. Would they like to stay personally involved in the use of their gift dollars?
6. Do they want to receive maximum tax benefit for their charitable contributions under federal law?
7. Do they place a priority on sound financial management of their contributions?

If you answered yes to any of these questions, your clients would benefit from knowing more about their local community foundation. We'd be happy to help you make an introduction.

Here to serve you.

Contact Karla Lodholz
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