

## Community foundations as a resource for you.

Professional advisors and  
community foundations  
**working together** for  
clients and community.



**Community foundations are a resource for advisors.** Attorneys, CPAs, financial planners, brokers, insurance agents, and other professional advisors are turning to community foundations to help enrich the charitable giving strategies of their clients. Here's why:

- Community foundations are *neutral experts* with technical information on a range of planned giving options—from executing gifts of real estate, stock, or personal property to establishing Donor Advised Funds. Community foundations help advisors provide their clients with the best charitable giving strategies based on each client's unique financial situation, tax status, and giving goals.
- Community foundations have *in-depth information* on local needs and nonprofit organizations. When clients ask, "how can I make sure my charitable gifts will make a difference?" many advisors turn to community foundations for information on the programs and agencies that are working effectively in the specific areas of interest to each client. Community foundations are in touch with local organizations and activities addressing the broad spectrum of community needs—ranging from the environment, arts, education, and economic development to special programs for youth, family, and seniors.
- Community foundations serve as the *vehicle for giving* many advisors seek for their clients. For example, community foundations can establish Donor Advised Funds—the very popular mechanism through which a client can make a charitable gift and stay personally involved in suggesting uses for that gift over time. Community foundations are frequently named in bequests as stewards for estate assets that a client wishes to direct to address specific areas of community need in perpetuity. Giving through a community foundation also provides a client time and resources for evaluating potential grant recipients, as well as the ability to give to multiple charities with a single gift.

*"Community foundations are a resource that enables people to be charitable in a very personal way."*



(CONTINUED ON REVERSE)

**Wayne County Community Foundation** is a nonprofit, charitable community organization created by and for the people of Wayne County, Ohio. We are here to help our donors make a positive impact and work to strengthen the community we all share.



### Three special features of community foundations

**One: personalized service.** We make giving easy and effective, accepting a wide variety of gifts and providing donors a number of charitable options. You can contribute cash, stocks, property, and bequests. You may establish a fund in your name or in the name of a loved one. In most cases, your gift qualifies for maximum tax advantage under federal law.

**Two: local expertise.** Our professional staff has an in-depth understanding of the issues, opportunities, and resources that shape our community. They monitor all areas of community need—including human services, education, the environment, healthcare, the arts, and economic development. We can help you learn more about local organizations and programs that make a difference in areas you care about most.

**Three: 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.

### Here are ways that we can help

Community foundations can support you and your clients at every step in the charitable giving process. We can help you:

- Identify your clients' charitable giving interests and motivations
- Match personal charitable interests with tax planning needs
- Create and implement charitable plans that are integrated into major business, personal and financial decisions
- Facilitate complex forms of giving and execute technical giving instruments (such as Charitable Remainder Trusts)
- Provide information on community needs—and on the local agencies and programs that make a difference in the areas your clients care about most
- Deliver grantmaking expertise and a range of administrative services related to charitable giving

### ***There's so much more we'd like you to know.***

*Wayne County Community Foundation can help you help your clients achieve their charitable giving goals. We welcome the opportunity to work with you.*