How can I recommend charity without recommending a charity?

Talk to your clients about giving through their local community foundation.

It’s a delicate dilemma. Estate planners, financial planners, and other professional advisors are often faced with a delicate dilemma: You want to discuss the many benefits of charitable giving with your clients, but you want to avoid recommending specific charitable causes or organizations.

Fortunately, there’s a simple solution. It’s your local community foundation. A community foundation is a single, trusted vehicle your clients can use to address the issues they care about most, while gaining maximum tax benefit under state and federal law. We offer a variety of giving options — including the ability to set up a charitable fund in your client’s name. It’s just one way we can help you help your clients achieve their charitable goals.

Iowa community foundations
For good. For Iowa. For ever.

Meet standards of excellence.

www.IowaCommunityFoundations.org