

# Professional Advisors and the Community Foundation

## A VALUED PARTNERSHIP

Professional advisors are key stakeholders helping the Community Foundation make philanthropy happen. More than 80% of our donors are referred to us by one or more of their professional advisors. One of our primary roles is to offer support and solutions that help professional advisors provide sterling service to their clients, linking those clients to effective charitable options.

Working with the Community Foundation can add an extra level of personal service for philanthropic clients to a professional advisor's practice. The Foundation can be a vital resource connecting your client's passions with great nonprofits. And we offer great professional learning opportunities like our acclaimed Philanthropic Advisor Leadership Institute (PALI).

Our team are experts in philanthropy. We work with professional advisors and their clients, helping donors to achieve their charitable goals, such as ways to give now and/or planned giving options. For donors, we make philanthropy easy and flexible, providing personalized services and access to our deep knowledge of the 23-county metro Atlanta region. This includes identifying critical issues affecting our region and high performing nonprofit organizations addressing those issues.

### 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 philanthropy.**
- ◆ While we do not give tax or legal advice, **we are available to discuss planning ideas and to refer you to resources** that can help you get the best solution for your clients' needs.
- ◆ **Advisor toolkit:** We've put the most used information all in one place for your convenience. Find general information about the Community Foundation, different gift types and assets, agreements and forms, planned giving information, wire instructions, stock transfer instructions and our legal name and TIN. Visit: [cfgreateratlanta.org/advisor-toolkit/](http://cfgreateratlanta.org/advisor-toolkit/).
- ◆ **Balser Symposium:** This annual continuing education opportunity is sponsored by the Jewish Federation of Greater Atlanta, the Community Foundation and United Way of Greater Atlanta. The symposium focuses on charitable and estate planning issues with prominent local and national speakers.
- ◆ **Philanthropic Advisor Leadership Institute (PALI):** PALI is a multi-session leadership development program for metro Atlanta's professional advisors. Sponsored by the Community Foundation, the Jewish Federation of Greater Atlanta and the United Way of Greater Atlanta, this competitive program selects participants through an application process every year.

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Visit [cfgreateratlanta.org](http://cfgreateratlanta.org)  
for more information





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*(Resources for professional advisors continued)*

- ◆ **Professional firm presentations:** The Community Foundation and its gift planning staff conduct presentations for area professional firms on a variety of charitable planning topics. We conduct numerous “lunch and learn” presentations for professional firms throughout the year.
- ◆ **Public speaking:** The Community Foundation’s expert staff is available to speak to professional and civic groups on topics related to philanthropy including family philanthropy, charitable planning and community development.

## How to begin a client discussion on charitable planning

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

### We suggest asking every client the following threshold questions:

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

If the answer to any of these questions is “yes,” then you have opened the door to a deeper conversation that can lead to more meaningful planning and a stronger client relationship.

### Some follow-up questions to consider are:

- ◆ What are the issues, causes and charities that you feel passionate about? Why?
- ◆ How would you prioritize them? Why?
- ◆ Which of your past charitable gifts have given you the most satisfaction? The least? Why?
- ◆ Given your other commitments, how much time do you have to devote to charity?
- ◆ What level of recognition and visibility interests you?
- ◆ To what extent would you like to get your family involved in your giving?
- ◆ How much wealth do you want to leave to your children and grandchildren? If there is excess, would you consider designating it for charity?
- ◆ Would you prefer to give during your life or after your death?
- ◆ What values would you like to pass on to your descendants?
- ◆ How would you like to be remembered after you are gone? Would you like to leave a charitable legacy to perpetuate those memories?

## About us

Since 1951, the Community Foundation for Greater Atlanta has been a trusted philanthropic resource for our 23-county metro Atlanta region. We lead and inspire philanthropy to increase the vitality of our region and the well-being of all residents.

## Interested in our resources for professional advisors?

To access our resources for professional advisors or to discuss how the Community Foundation for Greater Atlanta can help your clients with their philanthropic goals, please contact Alison O’Carroll, director and philanthropic counsel, at [aocarroll@cfgreateratlanta.org](mailto:aocarroll@cfgreateratlanta.org) or call 404.333.0241.

