



Financial Advisor Program

Participating in our Financial Advisor Program creates a distinct advantage for financial advisors and their clients. Financial advisors can continue to manage their clients' assets and meet their clients' tax and charitable goals through charitable giving accounts, also known as donor advised funds.

A Win-Win for Advisors and Clients

The Financial Advisor Program benefits everyone involved, creating a significant and positive impact for clients' charitable causes. Financial advisors can:

- ▲ Continue to manage the assets contributed by their clients on their firms' investment platforms
- ▲ Convert non-managed client assets, such as real estate, closely-held interests, businesses, personal property, and art into charitable dollars that the advisor will manage
- ▲ Offer clients a value-added service by connecting them to some of the best charitable giving products and services available

Identifying Clients Who Qualify

Candidates for this program might:

- ▲ Plan to sell a private company
- ▲ Have high capital gains tax exposure
- ▲ Have a private family foundation they would like to simplify or wind-down
- ▲ Be in a "transition" phase of life – empty nest, retirement, or involved in estate planning
- ▲ Want a charitable tax deduction now with the flexibility to make distributions in the future (for example – charitable giving "bunching")
- ▲ Want to grow their contributions tax-free over time
- ▲ Have a desire to give something back to their community
- ▲ Want to leave a legacy for future generations

Learn More

The Financial Advisor Program requires financial advisors to adhere to professional and industry standards in managing donor funds and are subject to oversight by the Community Foundation's Investment Committee and Board. Statements are reconciled monthly. Learn more at www.communityfoundationhsv.org/for-financial-advisors