Bold Giving. Local Impact.

For Professional Advisors and Their Clients

COMMUNITY FOUNDATION of Snohomish County

Working with the

Community Foundation

is good for business

Help Your Clients Leave a Legacy.

Save on Taxes.

Does your client want to make a gift to a charity in her will? Does she want to support more than one charitable cause without the administrative hassle of a private foundation? Is she looking for ways to lessen the burden of estate, capital gains or income taxes? The Community Foundation can provide you with tailored options that will help your clients meet charitable, financial and personal goals.

Relationships Matter.

We understand that your client relationships are the most important part of your job. When professional advisors work with the Community Foundation, we let you take the lead while providing you with free resources and charitable giving options to present to your client.

Local Giving. Long-Term Impact.

Although the Foundation is a public charity, it does not promote one charitable cause. Instead, our mission is to build and hold endowments that support all kinds of nonprofit causes and provide for Snohomish County's changing needs.

Local Expertise.

With more than 500 nonprofits in Snohomish County it can be difficult to provide charitable expertise to your clients about the entire sector. Fortunately, we can help and we're free. We can even speak with you privately about the nonprofit sector, so you are well prepared for a client meeting.

"The Community Foundation is a great local resource and partner for professional advisors. The staff is very knowledgeable and has a breadth of experience. They are an invaluable member of the overall client service team and can help bring valuable perspective and diverse options to the financial planning process."

– Phil Knudson, CPA, Moss Adams

Specialized Resources at Your Fingertips

The Community Foundation wants to make your job easier. We can provide you with a variety of free resources and materials in person or via our website.

For Attorneys

www.cf-sc.org/plan/attorneys/

Whether your client is considering a bequest to a specific nonprofit, or is interested in providing for the financial needs of a loved one, we can help.

- What is the language I need to include in my client's will if he is leaving a charitable bequest?
- What are the tax benefits of making a gift of real estate, stock, a life insurance policy or another non-cash asset?
- How might my client make a charitable gift that provides his loved ones with a stream of income after he is gone?

For Financial Planners and Advisors

www.cf-sc.org/plan/financial-advisors/

Significant giving opportunities arise when your clients make major business, personal, and financial decisions. We offer the maximum tax advantage under state and federal law, and we simplify IRS recordkeeping.

- What types of assets are the most tax-friendly for my client to donate?
- My client says he wants to create a private foundation. How might a donor advised fund be a better option?
- How can I continue to manage my client's assets and help her meet her charitable giving goals at the same time?

For Accountants

www.cf-sc.org/plan/accountants/

Opportunities to create a legacy through charitable giving often have tax-friendly results whether it's because a client makes a gift to a specific charity, is selling a business, or is looking to reduce his taxable estate.

- Is it more beneficial for my client to make a gift of stock, real estate, or cash?
- Do you have nonprofit clients? Our agency endowment funds and nonprofit support services can help.
- Is there a way to transfer an IRA required minimum distribution to charity and reduce my client's taxes?

**scan the code above with your phone for links to materials*

"The Community Foundation provides me with the tools I need to help my clients create estate plans that meet their financial goals and are personally fulfilling. The Community Foundation is an exceptional resource that helps me improve the service I provide to my clients."

– Melinda Grout, Law Office of Melinda K Grout

Our goal is to provide you with information, resources, and tools that strengthen your relationship with your client and make our community a better place to live.

Let us know how we can help.

Visit our website ***www.cf-sc.org/plan*** for online resources, printable samples and other sources of information on charitable giving options for your clients.

Would you like to give your clients the opportunity to ask specific questions about charitable giving in their community? Contact Elena Pullen-Venema, Director of Development, to arrange a private meeting where you and your clients can explore a variety of options. You can contact Elena via email at elena@cf-sc.org or phone at (425) 212-4056.

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