

The Value of Community & Health Foundations to Planning Professionals and How to **Engage** with Them

A Strategic Partner in Philanthropic Planning

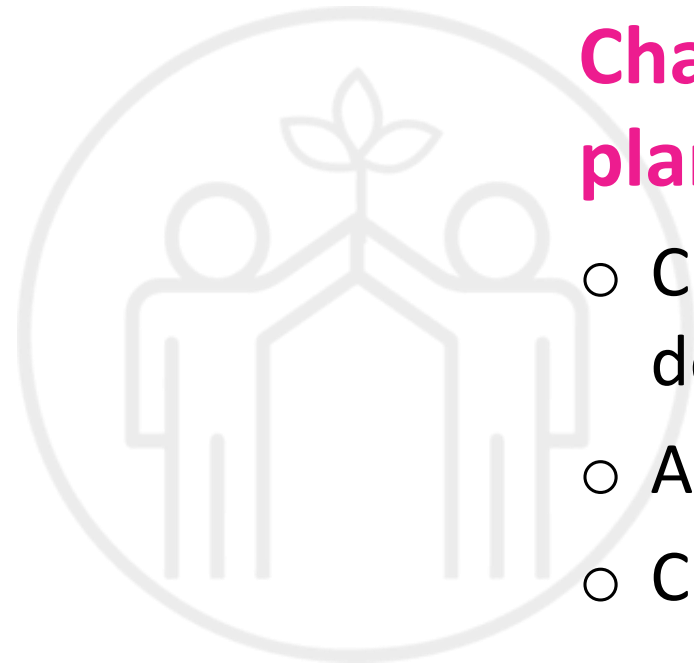
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Vice President of Philanthropy



Why Philanthropy Matters in Planning

Charitable intent is increasingly central to wealth planning.

- Clients want alignment between values and financial decisions.
- Advisors need efficient, credible charitable solutions.
- Charitable deductions can be a driver of philanthropy.

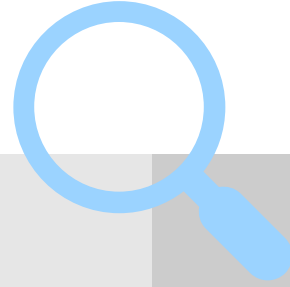


Why Professional Advisers **Matter**

A man in a light-colored shirt and glasses is looking at a document held by a woman in a dark blue sleeveless top. They are standing in a modern office hallway with glass walls and doors. The man is on the left, and the woman is on the right. The background is slightly blurred, showing office furniture and lighting.

- **Number 1 referral source**
- **Gatekeepers to high-value donors**
- **Trusted relationships built over years**
- **Advisors influence timing, structure, & feasibility of gifts**

Understanding the Advisor's Perspective



**Risk management &
liability concerns**

**Client privacy and
confidentiality**

**Desire to provide value,
not push philanthropy**

**Need clarity, confidence, & competence
from nonprofit partners**

Barriers Advisors Commonly Face

- Unclear nonprofit policies (gift acceptance, valuation, etc.)
- Fear of being asked to “sell” philanthropy
- Worry about overwhelming clients with solicitation
- Lack of familiarity with advanced giving tools
- Not comfortable in bringing up the topic

Foundations as Advisor Partners

Complement—not compete with—professional advisors.

- Focus exclusively on the charitable component of planning
- Act as an extension of the advisory team



ATTORNEYS

Where We Add Value

Simplify charitable provisions in estate plans

- Support bequests, charitable trusts, and testamentary gifts
- Reduce complexity compared to private foundations

ATTORNEYS

Client Outcomes

Clear execution of
charitable intent

Reduced administrative burden on heirs

Permanent stewardship beyond the client's lifetime

CPAs & TAX PROFESSIONALS

Where We Add Value

Tax-efficient charitable planning tools

- Acceptance of appreciated and non-cash assets
- Accurate, timely gift substantiation

CPAs & TAX PROFESSIONALS

Client **Outcomes**

**Optimized
charitable
deductions**

Reduced capital gains exposure

Simplified tax reporting

FINANCIAL ADVISORS

Where We Add Value

Integrates philanthropy into wealth strategies

- Flexible charitable vehicles
- Supports multi-generational engagement

FINANCIAL ADVISORS

Practice **Benefits**

**Deepens client
relationships**

Differentiates advisory services

Retains assets within the advisory ecosystem

TRUST OFFICERS & FIDUCIARIES

Where We Add Value

Reliable charitable partner for trusts and estates

- Grant administration and compliance support
- Nonprofit due diligence

TRUST OFFICERS & FIDUCIARIES

Risk Management

**Reduced
fiduciary risk**

Clear documentation and reporting

Consistency across generations

BUSINESS OWNERS

& Liquidity Events

Pre- and post-liquidity charitable planning

- Acceptance of closely held business interests
- Tax efficiency at exit

BUSINESS OWNERS

Client Outcomes

Strategic
deployment of
wealth

Legacy beyond the transaction

Community impact aligned with success



Understanding of *real* community needs.

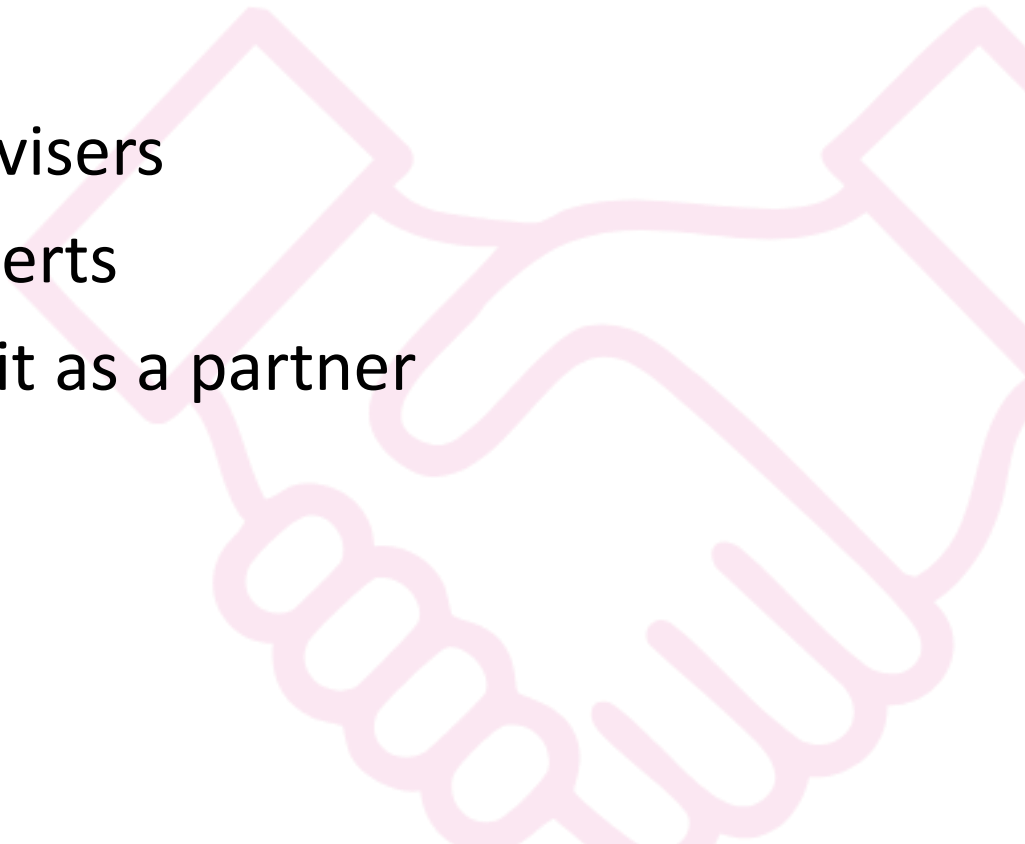
Vetted nonprofit partners.

Long-term place-based impact.

Why Local Matters

Co-Branded Education

- Offer CE/CLE/CPE credits when possible
- Jointly present case studies with local advisers
- Let advisers shine—position them as experts
- Creates trust and positions your nonprofit as a partner



Tools Advisors Can Use

- One-page gift planning briefs
- Charitable gift calculator links
- Gift acceptance cheat sheets
- Sample bequest language & beneficiary forms
- Quarterly advisor update emails



Advisor-Focused Events

- Breakfast briefings with case studies
- Invite regional estate planning councils
- Host donor + advisor appreciation events
- Facilitate networking among advisors



Provide Donor-Friendly Solutions

- DAFs, CGAs, CRTs, retained life estates
- Non-cash gifts expertise: real estate, crypto, privately held stock
- Advisers appreciate nonprofits who understand complexity
- You reduce friction → they send more clients





Key Takeaways

Community & Health Foundations enhance—not replace—advisors.

They simplify charitable planning.

They strengthen client outcomes
and relationships.

Philanthropy is not a transaction. It is a long-term partnership. Our Foundations help make it enduring.

GULF COAST
COMMUNITY FOUNDATION