



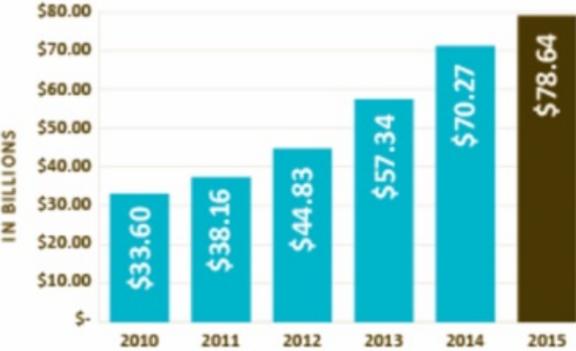
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Staying On Trend: Why the donor-advised fund is a vehicle professional advisors need to know

Donor Advised Funds preferred charitable giving vehicle

Charitable assets in donor-advised fund accounts total over \$78 billion, an all time high—an increase of 11.9% over the prior year.



Donor-advised funds are the fastest-growing philanthropic planning vehicle in today's wealth management marketplace and have risen dramatically in popularity over the last several years. Total assets held in these vehicles grew nearly 12 percent in 2015 to reach \$78 billion by the beginning of 2016.

These funds are popular because they allow an individual or family to make a tax-deductible transfer that qualifies as a charitable contribution, and then later recommend gifts to favorite charities from the fund when the time is right. A donor-advised fund operates a lot like a checking or savings account just for charity, and it's established according to the IRS guidelines that create the tax advantages.

How can you connect this trend to your work with your clients? Here are three pointers.

[Read full article](#)

Opportunities for Professional Advisors

Donor-Advised Funds For Advisors

Experience our philanthropic expertise, personal attention, and local knowledge just like your clients do.

We're now offering funds to professional advisors with a lower minimum to establish. You can open a fund with a gift of \$5,000.

Contact a member of our Philanthropic Services team today! 303.442.0436

[email Philanthropic Services](#)

TRENDS Report Presentations

The 10th edition of our Boulder County TRENDS Report is out!

All of the information is available on our new [TRENDS Report website](#), and copies of the report are available at our office.

You and your clients can catch a presentation of the findings at one of our public presentations. [See calendar](#)

[more](#)

Planned Gifts At Your Community Foundation



Big Questions For Professional Advisors: Why your clients are asking about philanthropy tools

What is Happening with Your Clients?



30 TRILLION IN THE NEXT 30 YEARS

The expected amount that will be passed down from Baby Boomers to Generation X to Millennials.¹



98% OF AFFLUENT FAMILIES GIVE

Philanthropy is nearly universal: 98% give to at least one charity per year.²



90% OF ASSETS WALK OUT THE DOOR

There is a risk advisers will lose the money when it is passed: 90% of assets are lost when client estates pass on to their heirs.³



80% NOT TARGETED

Only 20% of advisers are targeting younger family members of their clients.⁴

1: Investment News, The Great Wealth Transfer is Coming, Putting Advisers at Risk, Liz Skinner 7/13/15

2: Financial Planning (www.financial-planning.com/blogs/5-ways-to-hold-onto-the-next-generation-of-clients-2684723-1.html)

3: Donor-Advised Funds Gain Popularity for Charitable Giving, The Philanthropist (NPT Blog) - www.nptrust.org/philanthropist/entries/news_for_donors/donor-advised-funds-gain-popularity-for-charitable-giving

According to the most recent U.S. Trust Study of High Net Worth Philanthropy, conducted in partnership with the Indiana University Lilly Family School Philanthropy, 98% of high-net worth clients are giving to favorite charities each year. And they want help from their attorneys, accountants, and financial advisors!

Unfortunately, only 14% of advisors actually offer to help their clients with charitable planning, and only 20% of advisors target younger family members. This is part of the reason next-generation loyalty to advisors is so low.

Philanthropy is a natural connector across generations. When you work with your clients on their charitable goals, it's very natural and appropriate to involve children and grandchildren. Philanthropic planning allows advisors to build next-generation relationships with clients' heirs while the clients are still alive and well.

So what do your clients want to know? [Read full article](#)

What else are clients asking? [View "How to get your financial advisor on board with your giving"](#)

In Their Own Words: Donor Spotlights

Our [blog features monthly interviews with our donors](#), as well as grantees and other updates about our work around Boulder County.

Donating to *your* Community Foundation
makes a local impact you can see.
Get inspired. Donate here.

2017 Statement Of Affirmation

The Community Foundation Boulder County is committed to being a community catalyst for good, alongside donors and partners like you. We believe our community is stronger when all people - women and men, children, older adults, immigrants, people of color, GLBTQ individuals, those with varying abilities and from all faiths - are respected, welcomed, and invited to share their assets and contributions in community building.

We stand with others, in Boulder County and beyond, who courageously strive to build more inclusive communities rather than walls of division. We remain wholeheartedly committed to social justice for our most marginalized and vulnerable people and for the care of threatened environments. We believe in the power of art and music to improve our lives and community. Now, more than ever, we seek opportunities for local action and invite you to join us in our **ongoing leadership work** that includes grantmaking, outreach, and advocacy. We accomplish more together than we do alone.

More Information From The Field

8 Cool Ways Your Donors Can Give With CRTS (Gregory Baker)

A Symbiotic Relationship: Balancing the use of private foundations with donor-advised funds can help meet philanthropists' needs (Trusts & Estates, 2011)

