



This holiday season we're grateful for your partnership. Together, we help clients meet their philanthropic goals and make the difference important to them.

May your holiday season be festive and your New Year full of good health and abundance!

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## Opportunities for Local 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. You can open a fund with a gift of \$2,500.**

Contact a member of our Philanthropic Services team today! 303.442.0436

### Professional Advisor Council

We're forming a Professional Advisor Council, and we'd love to have you on it!

Please contact Caroline Landry for more information.

[Email](#)

## It's Required Minimum Distribution Season!



Donors age 70.5 and older can transfer up to \$100K from their IRAs to Community Foundation Boulder County, as a tax-free lifetime gift. Your clients can choose to transfer all or a portion of their IRA to a fund at Community Foundation Boulder County.

### -Allocate gifts to one of our endowed funds

supporting our initiatives or funding areas to build a more vibrant and equitable Boulder County. Examples include improving opportunities for local youth, LGBTQ and Latino residents, or giving to our Community Trust to broadly impact area nonprofits.

-Create a designated endowment that permanently responds to a cause your clients are passionate about.

-Designate an unrestricted gift to the Community Foundation.

*\*Please note a direct IRA distribution to a donor-advised fund is treated as a taxable withdrawal, which may qualify for an offsetting charitable deduction. For informational purposes only and not for the purpose of providing legal or tax advice.*

## Why The Donor-Advised Fund Is A Vehicle Professional Advisors Need To Know

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.

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](#)



**November Message From Board Chair,  
Leslie Allen**

[Read](#)



**November Message From CEO,  
Jeff Hirota**

[Read](#)

## Know Your Community Foundation Team

We're pleased to work with professional advisors around Boulder County to ensure your clients receive stellar service and a personalized approach to actualizing their philanthropic goals and related tax savings. With our practice of working in partnership, knowledge of local issues and the philanthropic landscape, and commitment to impact, we're your best resource for donor-advised funds and planned giving. Please contact us to learn how we can assist you and your clients now and into next year.

Members of our Philanthropic Services Team:

- **Lynda Ricketson, Vice President of Philanthropic Services**
- **Peggy Driscoll, Major Gifts Officer**
- **Robyn Hazlitt, Philanthropic Services & Communications Associate**
- **Caroline Landry, Major Gifts Officer**
- **Maegan Vallejo, Individual Giving Coordinator**
- **Matt Zwiebel, Director, Pledge 1% Colorado**

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



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