



COMMUNITY FOUNDATION BOULDER COUNTY

INSPIRING IDEAS. IGNITING ACTION.™

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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

[Email Philanthropic Services](#)

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](#)

Clients And 2018 Goals: Why Staying Asset-Savvy Matters

You've been advising your clients all year about their retirement goals, their goals for supporting their children and grandchildren, and their goals for the legacy they intend to leave to the community causes they care most about.

In all of the planning work you're doing for clients, you know assets matter to achieving goals. This is certainly the case in philanthropy planning. How many of your clients are still supporting their favorite causes with cash gifts? That's not tax efficient, as you know.

If your clients are holding highly-appreciated assets, such as stock or real estate, and they are planning to make a significant gift to charity, consider advising them to give the appreciated assets instead of cash. Assets like appreciated stock can be sold by the charity for 100 cents on the dollar - no capital gains tax applies. That means the charity ends up with more money to work with than the client would if the client had sold that same asset.

You have a responsibility to advise your clients about the best charitable giving vehicles to meet their goals. Frequently, a [donor-advised fund at Community Foundation Boulder County](#) is the best solution. (There is a reason donor-advised funds are growing three times faster than private foundations!)

If your client wants to support several charities all at once but has a single large asset that would be perfect to contribute, encourage your client to consider using a donor-advised fund to facilitate the contributions. Our minimum to establish a donor-advised fund is \$25,000. The client can transfer the asset to the fund, get the tax benefits, have the asset converted to cash, and then allocate the proceeds to several different charities of the client's choice. The proceeds can even be held in an endowment fund to ensure long-term support of a favorite cause, or used to create a fund in the client's name managed by the Community Foundation to support the community's greatest needs now and in the future.

Be sure to think outside the box. Sometimes even artwork, jewelry, antiques, limited edition books, and other collections can be contributed to a donor-advised fund with excellent results for your client and the community.

Your Community Foundation's team can help you structure the [best philanthropy plan](#) for your clients, their families, and the communities they love. (Meet our Philanthropic Services Team below.)

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 and LGBTQI and Latino residents, or giving to our Community Trust to broadly impact area nonprofits.

-Create an endowment that permanently responds to a causes your clients are passionate about.

-Designate an unrestricted gift to the Community Foundation.

Contact Philanthropic Services for more information:
PhilanthropicServices@commfound.org or 303.442.0436.

Meet 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**

PhilanthropicServices@commfound.org | 303.442.0436 | commfound.org/advisors

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



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