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Advisors are such powerful influencers for philanthropy. Thanks for gathering on October 12 at the Oscar Blues Brewery in Longmont to learn more about the Community Foundation Boulder County. Left to right: Shelly Merritt, Connie Eyster, Margaret Katz

You And Your Community Foundation

We are here for you! In a series of articles, the [Philanthropic Services team](#) at the Community Foundation Boulder County will share with you the ways we'd love to work together to help your clients fulfill their charitable goals and leave a legacy not only to their children and grandchildren, but also to the community where your clients' families and businesses have grown and thrived.

In the articles that follow, you'll learn why working with the Community Foundation Boulder County is an important way for you to deliver value to your clients, fulfill your responsibility as a professional, and work side-by-side with us as your partner in your practice and your community. Here's what you can expect to hear more about in the weeks ahead.

Your clients are the priority

We understand that your relationships with your clients are your top priority. The key word is "relationship." We are committed to helping you build, maintain, and deepen your connections with your clients as their "go to" advisors for wealth management, accounting, and estate planning across generations. We will never create obstacles between you and your clients; rather, we are here to assist you in whatever capacity makes the most sense for you to deliver value to the individuals, families, and businesses you serve.

Your responsibility is taken seriously

In today's social impact culture, philanthropic planning isn't just a nice to have. It's a must have. To fulfill your obligations to serve your clients, you need to know the full range of everything the laws and regulations offer in establishing tax-savvy charitable giving vehicles that meet your clients' goals. Our experts are here to guide you! We'll point you in the right direction to find the very best articles and materials to help you advise your clients. Philanthropy conducted through the Community Foundation Boulder County meets the high standards of today's best practices for achieving tax effective social impact objectives.

Your community foundation is your partner

We would be pleased and honored to work with you. Whether you're establishing a [donor-advised fund](#) for a client, discussing charitable legacies, or assisting a C-level executive with corporate giving strategies, your Community Foundation would love to be your partner.

We also want to be sure Financial Advisors are familiar with our [Financial Advisor Program](#). This program is a win-win, allowing your clients to open a donor-advised fund with us while you continue to manage the assets.

At any time of year, the members of our Philanthropic Services team are available to answer your questions. We'll ensure you get timely answers back to your clients. You can contact us at 303.442.0436 or PhilanthropicServices@commfound.org.

Planned Giving: The Experts Weigh In



Fall Opportunities

Annual Friends Party

You inspire us and we want to inspire you. Please join us for an evening of ideas sure to ignite action.

We'll share what we learned during our 2017 Listening Tour, when hundreds of community members told us what's in their hearts and on their minds. We'll also present highlights from the latest edition of TRENDS and our work in 2017. Let's get inspired for the next wave of making a difference together!

Wednesday, November 1
Boulder Jewish Community Center
5:30 p.m.

Register before October 25

TRENDS Report Presentations

The 10th edition of our Boulder County TRENDS Report was released this week.

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

Do Something Good: Why Community Connections Are Now Part Of Your Client Work



"It took us a while to think things through, but - in the end - it was an easy decision to support our community through the Community Foundation. And it's really changed the focus and the energy of our lives, while we're still here." ~ Jennie Arbogash, Legacy Society Member

Today's social impact culture mindset has infiltrated every business, nonprofit, and financial institution in America. The boundaries of our personal and professional lives are blurred across a wide range of social impact behaviors.

What does this mean for your work with your clients? It means your clients are walking into your office with "doing good" on their minds. You can build an immediate connection with your clients when you start a conversation about the ways they - and you - are getting involved in the community. Here are three tips for starting that conversation.

Demonstrate that you are in touch with the wide range of "doing good" activities.

With the rapid rise of social consciousness, philanthropy is expanding to cover far more territory than just one or two ways to do good. Consider the full footprint of social impact lifestyle factors that make up the contemporary marketplace mindset: Giving to charities, volunteering in the community, serving on boards, donating necessities to people in need, recycling, purchasing products that support a cause, marketing a favorite organization, celebrating at fundraising events, sharing with friends and family, and caring about your own well-being. Ask your clients about a few of these social impact behaviors. This lets them know that you care about them as human beings.

Be aware of the regulatory environment.

Many of your clients who run or own businesses are paying attention to social responsibility in the corporate sector. For example, the Global Reporting Initiative (GRI) is an international standards organization that helps businesses, governments, and other groups understand and communicate the impact of business on critical sustainability issues such as climate change, human rights, corruption, and many others. GRI represents the commitment of hundreds of companies to strive toward a common set of benchmarks to protect the earth and humanity. More than 90 percent of the world's largest 250 companies are among the thousands of "GRI reporters," meaning they subscribe to the organization's standards for sustainability performance. Or perhaps, your small business owners are considering how to get the message out about their community engagement efforts. Ask your clients about their corporate commitment to civic engagement.

Show your clients that you are doing something, too.

Your clients want to know that you share their commitment to community. Give them peace of mind by talking about your own volunteering efforts, the boards you serve on, or the charities you support. Best of all, let your clients know that you are connected to the Community Foundation, an organization committed to helping people fulfill community dreams through the power of philanthropy.

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.



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