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Fun was had by all at our September 27 Professional Advisor Happy Hour! Colleagues gathered on our patio to catch up, meet our new VP of Philanthropic Services Lynda Ricketson, and celebrate autumn.

If you weren't able to make it, we hope to see you next time. We thanked everyone who participated in our advisor focus groups and surveys last spring. Those inquiries educated

us about what you want from your community foundation. We learned you want both social and educational events, a donor-advised fund built especially for you, and a Professional Advisors Council. See more details below and remember: we're here to partner to meet your clients' needs.

## 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

[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](#)

## Your Clients And The Social Impact Culture

*Counseling Clients Who Serve On Boards*

*Why The Next Generation And Philanthropy Go Together*

## 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 the Community Foundation.

-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.

## 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.

## 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](#)

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## Planned Gifts At Your Community Foundation



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

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## Statement Of Affirmation

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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