

DONOR ADVISED FUNDS

## Have meaningful conversations with your clients about philanthropy



Philanthropic planning is a value-added service that is deeply meaningful to clients and beneficial to your practice. This service helps to establish 'sticky business' by tapping into the values of your clients.

When clients begin their philanthropic journey, they start by consulting various resources such as friends, family, well known publicly available information and people they trust who already have a deep understanding of their finances

See article: [Optimize your clients' tax strategies with charitable giving](#)



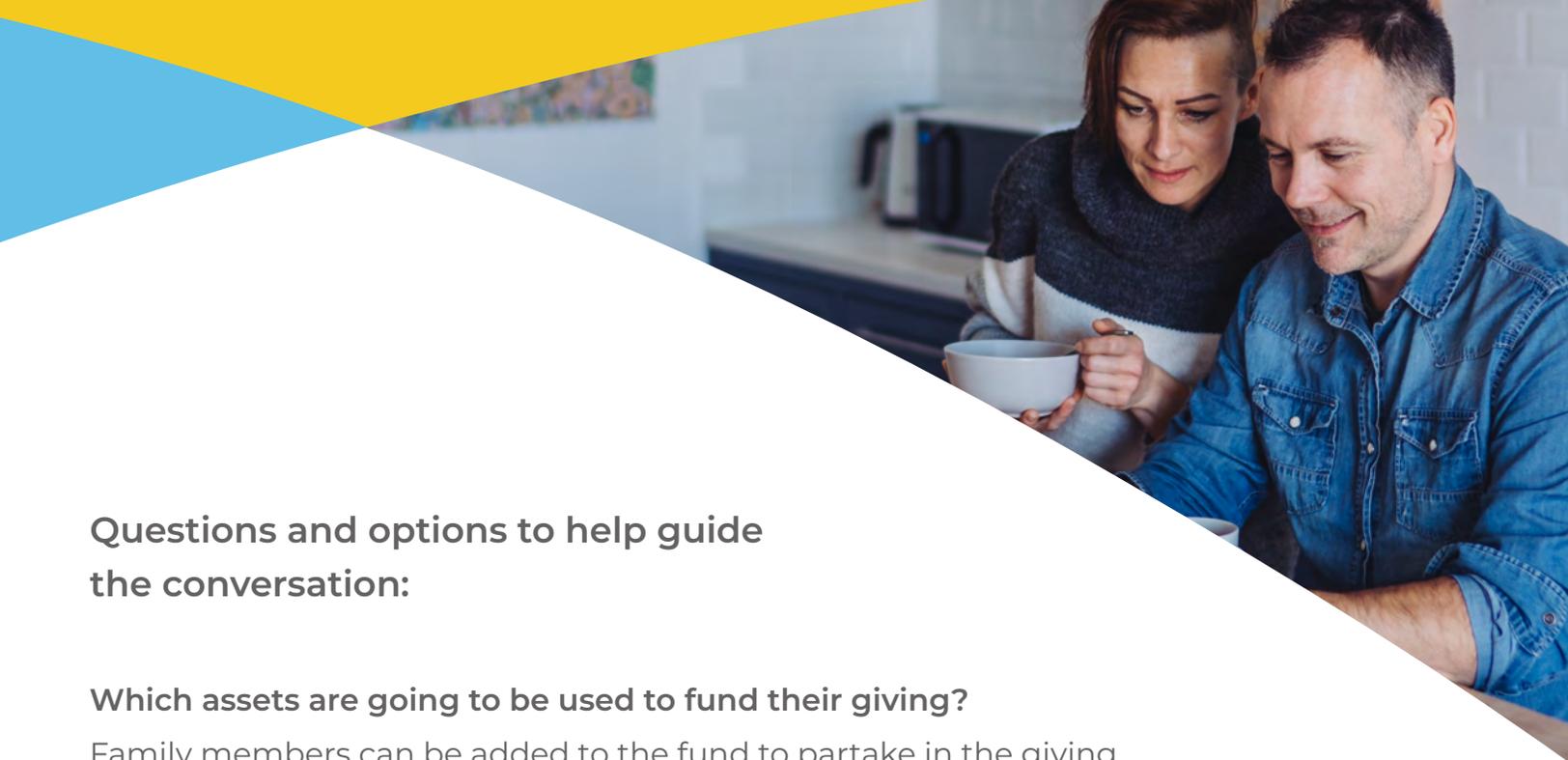
### **Why outsource one of the most important factors to deepen client relationships?**

By making charitable conversations a key pillar of the relationship, advisors are empowered to strengthen bonds with clients. With in-house charitable planning, you can make holistic wealth management truly whole.

**As your clients' trusted advisor, you are positioned to help them not only realize their charitable goals, but also understand tax implications and advantages.**

To bring philanthropy into a holistic wealth management approach, start a conversation with your clients when the relationship first begins. Also, know the advantages of Donor Advised Funds when a timely event takes place in your client's life. For example: A financial windfall such as the sale of a business, a year-end bonus or the sale of real estate.

To get started, on the next page are some considerations your clients should keep in mind if they are desiring to maximize the impact of their donations.



## Questions and options to help guide the conversation:

### **Which assets are going to be used to fund their giving?**

Family members can be added to the fund to partake in the giving experience as well as the establishment of a successor/ beneficiary plan.

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A variety of contribution types are supported – cash, securities, automatic bank payments, DAF transfers and even fundraising to promote the family's mission.

### **What are their giving objectives?**

Share the provided tools and resources with your client to help teach them how to research worthy causes and charities. GiveWise offers philanthropic services to assist with research.

### **Will they want their philanthropic investment to increase over time?**

This is where you can explain as their advisor that investment options are available to help grow your clients' contributions. A broad range of risk profiles can be established and aligned with their giving goals.

### **How much do they intend on granting each year?**

Develop an understanding of how much and how often your client intends to give. This will help you know how to make investment recommendations and keep your client on track of their giving goals.



Is a Donor Advised Fund (DAF) the right tax-optimized charitable solution for your clients?

Help them protect, grow, and share their wealth today.

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