

8. Your client wants help with **strategic giving** and can benefit from the advice of the Foundation's grantmaking experts to have the greatest community impact.

9. Your client has an **overfunded retirement plan or substantial IRA/401(k) assets** that have become an estate planning issue. The Foundation can work with you and your client's other advisors to provide information to help the client evaluate the most beneficial asset distribution to potentially minimize taxes, give more to heirs and preserve charitable intent.

10. Your client wants to establish a scholarship fund or a **fund for some special purpose**, but he/she needs help in how to set this up and maintain it.

Why a Talk with Your Clients about Charitable Giving Makes Good Sense

Many advisors are uncomfortable raising the subject of charitable giving with their clients. By not broaching the subject, however, a significant opportunity may be lost for their clients and for the community. In fact, research has shown that many individuals – particularly those of high net worth – expect their advisors to bring up the subject, if appropriate. If the subject is not raised by the advisor, they frequently assume charitable giving is not an option. The Dayton Foundation is available to help advisors with such charitable giving discussions.



The Dayton Foundation
We help you help others.

The Regional Community Foundation

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Confirmed in Compliance with
National Standards for U.S.
Community Foundations



We help you help others.™

How to Be a Hero to Your Clients



The Dayton Foundation Partnership with the Advisor Community

Founded in 1921 as a community foundation, The Dayton Foundation's only business is to foster charitable giving, serve charitable people well and provide leadership to meet changing needs in Greater Dayton.

The Foundation truly values the financial and legal advisor community and views the relationship as essential to our ability to effectively serve charitable people and grow philanthropy in our region.

Advisors likewise have told us that their relationship with The Dayton Foundation helps them to better serve their clients and simplifies their job.

The partnership between CPAs, attorneys and financial planners and The Dayton Foundation has resulted in the Foundation's rapid growth to over \$600 million in donor funds. Likewise, tens of millions of dollars in charitable gifts flow out each year from more than 3,900 Foundation donor funds to support thousands of not-for-profit organizations throughout the U.S. and a broad range of charitable purposes.

Hundreds of local advisors have affirmed The Dayton Foundation's value through repeated client referrals



The Dayton Foundation
We help you help others.

Since 1921,
helping people
to help others.

Advisors partner with The Dayton Foundation to deliver the most tax-wise and effective giving methods to clients

- innovative ways to serve your clients and simplify their charitable giving
- expertise in the latest charitable gift strategies, with backroom support for you
- stability, community trust and excellent service

and their continued use of the Foundation as a value-added service to their clients. Many advisor partners also like that they can continue to manage donor funds, as long as they meet the standards outlined in the Foundation's investment policy.

Benefits to Advisors

You can help your clients make the most of their charitable dollars. Donors frequently tell us that giving wisely to charity is not easy. We work to simplify donors' charitable giving and help to make it more tax-effective and have maximum impact. Ultimately, your clients will have you to

► MORE



“Although our clients are donating funds to The Dayton Foundation, they appreciate that their personal financial advisor can continue to manage their assets. Partnering with the Foundation to better serve clients' charitable needs is a win for you, your client and our community.”

– Shaun P. Nicholson, CFP, Managing Director of Wealth Management, The Cornell/Nicholson Team, UBS Financial Services, Inc.



“The Dayton Foundation is my go-to resource for processing, designing and implementing charitable giving strategies. I can count on prompt, resourceful and creative solutions when I consult with the Foundation’s staff for guidance about charitable planning issues.”

– Nancy A. Roberson, Attorney and Counselor at Law, Roberson Law

thank for connecting them with The Dayton Foundation to make their giving easier.

➤ **We keep you “in the loop.”** The Dayton Foundation understands your needs, as well as the needs of your clients. We work to keep you engaged with clients you have referred to us in every possible way. This may include managing current and deferred assets of your clients’ donated funds, if your client so chooses.

➤ **Your job is made easier.** Advisors regularly tell us that working with the Foundation helps them to serve their clients better and eases their workload. They appreciate that they have access to our staff’s financial planning and development expertise, at no cost, which is helpful in structuring their clients’ current and

planned charitable giving. They value our willingness to run charitable gift illustrations for use with their clients.

➤ **You have access to the community’s most comprehensive, central resource on charitable giving.**

Professional advisors value our staff expertise and up-to-date resources on charitable giving, including our charitable giving publication for advisors, *Futures*.

Also available to you is *GiftLaw*, a gift-planning tool for advisors interested in charitable gift-planning strategies, legislative updates and IRS rulings. *GiftLaw* can be found in the Advisors section of our website at www.daytonfoundation.org.

➤ **Your clients’ wishes will stand the test of time.** Foundation donors express a high level of satisfaction with the services of The Dayton Foundation. Because the Foundation is set up to be here in perpetuity, you can be assured that your clients’ charitable wishes will be honored and that their funds will receive the Foundation’s investment oversight for the life of their funds.

If family philanthropy over generations is a client’s goal, we have the ability to work with successive generations of your client’s family to continue their philanthropic tradition.

We provide long-term stewardship of donors’ charitable funds and rigorous adherence to donors’ wishes.

➤ **You and your clients have access to innovative, state-of-the-art donor service options.**

The Dayton Foundation has developed several nationally innovative donor services that can add flexibility and impact to your clients’ financial and estate plans.

What Advisors Have Told Us about Working with The Dayton Foundation

The following are based upon a random sample survey of more than 1,300 local financial and estate advisors.



“The Dayton Foundation makes my clients’ giving to charity so simple and worry-free. They do all the work, including the due diligence. It’s a strong organization that, like its donors, truly cares about Greater Dayton.”

– Stanley J. Katz, Founder, ClientFirst Financial Strategies, Inc., a division of Ross, Sinclaire and Associates, LLC

➤ 84% say they have recommended The Dayton Foundation to a client.

➤ 92% plan to recommend the Foundation to their clients in the future.

➤ 81% find our newsletter for advisors helpful in working with clients.

➤ 95% say they are satisfied with the assistance they receive from The Dayton Foundation.

Let Us Help You Help Others

Any client with an interest in charity may benefit from one of the many services of The Dayton Foundation. Please call us at (937) 222-0410 or toll free at (877) 222-0410 and ask to speak with a member of our Development and Donor Services department.

Want to learn more? Visit www.daytonfoundation.org to join our mailing list and receive our professional advisor newsletter, updates, notices of events, etc.

Please note: The Dayton Foundation does not practice law or offer financial or tax advice. The Foundation recommends that people considering establishing funds or legacies through the Foundation consult their financial, tax or legal advisor.

Some Charitable Opportunities Where The Dayton Foundation Can Help

Significant giving opportunities often arise when charitably minded clients are making major business, personal and financial decisions. While the Foundation does not practice law or offer tax advice, our staff can work with you to develop the best charitable solutions for your clients. We also can run illustrations for you to use with your clients.

The following are some typical situations where a call to The Dayton Foundation would be of value. These are only a few examples.

1. Your client has issues involving **year-end tax planning**, especially when a tax deduction is needed in one year, but charitable gifting will occur in another year.
2. Help is needed in **preserving an estate** or reducing estate taxes.
3. Assistance is needed to show how such methods as charitable life income gifts can **enhance your client’s retirement plan**.
4. When your client says he/she wants to **establish a private foundation**, the Foundation’s alternatives may provide major economic advantages.
5. Your client owns **closely held stock** and wants to use it to make charitable gifts.
6. Your client has **highly appreciated stock** and wishes to benefit **multiple charities**, or the charities he/she wishes to benefit are too small to accept direct stock gifts.
7. Your client owns highly appreciated stock in a **business that is about to be sold**. The Foundation can work with you on ways to structure a charitable gift to help the client reduce capital gains taxes and maximize charitable impact.