

gift to help the client reduce capital gains taxes and maximize charitable impact.

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're here for good.

The Regional Community
Foundation

500 Kettering Tower
Dayton, Ohio 45423

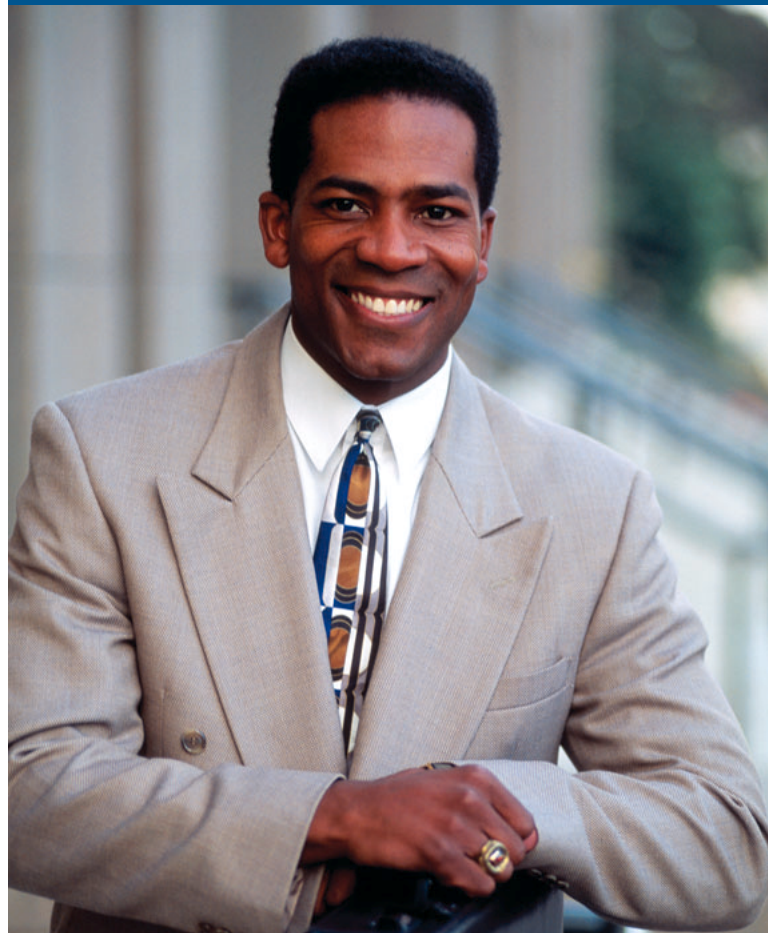
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E-mail: info@daytonfoundation.org

For a listing of The Dayton Foundation's Governing Board members and staff, visit our web site or give us a call.

How to Be a Hero to Your Clients



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
- 80+ years of stability, community trust and excellent service



Why Advisors Use The Dayton Foundation

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 the Greater Miami Valley.

• The Foundation truly values the financial and legal advisor community and views the relationship as essential to our effectively serving charitable people and growing 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 financial/estate planners and The Dayton Foundation has resulted in the Foundation's rapid growth to well over \$200 million in donor funds. Likewise, tens of millions of dollars in charitable gifts flow out each year from more than 2,200 Foundation donor funds to support hundreds of not-for-profit organizations and a broad range of charitable purposes. Furthermore, donor funds can continue to be managed by referring advisors

who meet the standards outlined in the Foundation's investment policy.

• Hundreds of local advisors have affirmed The Dayton Foundation's value through repeated client referrals and their continued use of the Foundation as a value-added service to their clients.

Benefits to Advisors

• We help you make the most of your clients' 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 thank for connecting them with The Dayton Foundation.

► MORE



"The Dayton Foundation is a valuable professional resource available to help you design a strategy or review alternatives to meet your clients' charitable objectives."

– Mark A. Conway, Attorney and Partner,
Thompson Hine, LLP



“The Dayton Foundation has a solid reputation and provides an excellent service for professional advisors in working with clients on effective plans for their charitable and planned giving.”

– Karen O. Crim, CPA, Principal, Battelle & Batelle LLP

• **We can make your job 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 can confer, without charge, with our staff, which has legal, accounting and development expertise, helpful in structuring your clients’ current and planned charitable giving. They value our willingness to run charitable gift illustrations for use with their clients.

• **We are the community’s most comprehensive, central resource on charitable giving.** Professional advisors value our staff expertise and the seminars and other up-to-date resources on charitable giving that the Foundation provides to them, including our special, quarterly, charitable giving publication for advisors.

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

• **We take good care of your clients.**

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 innovative, state-of-the-art donor service options** to you and your clients. The Dayton Foundation has developed several nationally innovative donor services that can add flexibility and impact to your clients’ financial and estate plans.

• **We keep you “in the loop.”** The Dayton Foundation understands your needs, as well as that of donors. We work to keep you engaged with clients you have referred to us in every possible way. This includes placing the invest-

ment of your clients’ donated funds with your organization, whenever appropriate.

• **We provide long-term stewardship** of donors’ charitable funds and rigorous adherence to donors’ wishes. Decades of donor satisfaction explain why 99.5% of all the Foundation’s constituent groups say The Dayton Foundation is a highly respected organization.

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.



“For years, I’ve seen The Dayton Foundation as a beacon, providing a first-rate, centralized source for charitable education and administration. I like that the Foundation puts no pressure on anyone and works to help our clients find the best solutions.”

– John M. York, First Vice President-Investments, Merrill Lynch

- 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 quarterly newsletter for advisors helpful in working with clients.
- 95% say they are satisfied with the assistance they receive from The Dayton Foundation.

Call Us If We Can Help

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. Ask for our Vice President of Development.

You also may request that we add you to our mailing list to receive our quarterly professional advisor newsletter, updates, notices of events for advisors, etc. You also may go online to our web site at www.daytonfoundation.org.

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, which has legal and accounting expertise, 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.

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