COMMUNITY FOUNDATION for SOUTHERN ARIZONA

PROFESSIONAL ADVISORS

Inspiring and Supporting Donors Making a Difference Now and Forever

At the Community Foundation for Southern Arizona, we are committed to helping you assist your clients in achieving their philanthropic goals. By partnering with the Community Foundation, you make it easier for your clients to give effectively, help them receive tax benefits they may not realize on their own, and help inspire and support them making a difference now and forever.

When donors establish a fund through the Community Foundation, they open the door to a broad range of charitable options. The Community Foundation can manage virtually any type of gift for most charitable purposes, offering a convenient, effective and powerful way to impact the community.

How does the Community Foundation Assist Professional Advisors

We partner with you. We provide support, information, and expertise related to charitable giving options.

We are experts on charitable giving. We tailor giving plans to meet your clients' particular needs, whether it's setting up an alternative to a private foundation or putting together a complicated estate plan.

We are experts about our community. Our program staff monitors all areas of community need—including human services, education, the environment, health care, the arts, and economic development. We can help your clients learn more about local agencies and programs that make a difference in the areas they care about most.

We help you connect across generations. When you help families establish endowed funds with us, they (and you) can stay involved for generations.

We help your clients who may donate a variety of assets. These might include cash, appreciated securities, retirement funds, life insurance, and real estate. These can be assets they give now or later as part of their estate plans.

As a public charity, we offer federal and state tax benefits. Starting a fund at a community foundation is significantly less expensive, and easier, than starting a private foundation.

You can help make a difference in the lives of your clients. By partnering with us, you may be able to help your clients increase their current income, increase their beneficiaries' inheritance, leave a legacy in the community, and teach their children about philanthropy.

Q2_14

2250 East Broadway Boulevard • Tucson, Arizona 85719 • Phone: 520-770-0800 • Fax: 520-770-1500
cfsaz.org

Is giving through the Community Foundation right for your clients?

If you answer yes to any of the questions below, your clients would benefit from knowing more about the Community Foundation.

1. Do I have clients who care deeply about their local community?
2. Do they want to receive maximum tax benefit for their charitable contributions under federal law?
3. Do they give to more than one charitable cause?
4. Are they interested in creating a personal or family legacy in their community?
5. Are they considering the creation of a private foundation, but concerned about cost and administrative complexity?
6. Would they like to stay personally involved in the use of their gift dollars?
7. Do they place a priority on sound financial management of their contributions?

Ways we can help you

The Community Foundation can support you and your clients at every step in the charitable giving process. We can help you:

1. Identify your clients' charitable giving interests and motivations.
2. Match personal charitable interests with tax planning needs.
3. Create and implement charitable plans that are integrated with major business, personal, and financial decisions.
4. Facilitate complex forms of giving and administer technical giving instruments (such as Charitable Remainder Trusts).
5. Provide information on community needs, and on the local agencies and programs that make a difference in the areas your clients care about most.
6. Deliver grantmaking expertise and a range of administrative services related to charitable giving.