

WINTER 2021



HAWAI'I COMMUNITY
FOUNDATION

Advisor Insights

Quarterly News & Resources for Professional Advisors

Kung Hee Fat Choy!

According to the Chinese horoscope, 2022 will be a year of risk-taking and adventure. In this Year of the Tiger, my wish is to embrace that bold spirit, stepping forward out of last year's uncertainty with renewed enthusiasm and excitement for the future.

For advisors, although it's not yet clear what may happen with tax reform under the Build Back Better Act, we can still bring that enthusiasm to helping philanthropic individuals and families make a difference in our community.

In this edition of Advisor Insights, we offer a wealth of information and ideas to help you help your clients achieve their bold philanthropic goals.

Mahalo for trusting Hawai'i Community Foundation to be your charitable giving resource in the islands. We wish you a happy, healthy, and prosperous 2022!

Aloha always,

Jen-L W. Lyman

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Latest News



Corporate Philanthropy for Family Businesses: Questions to Get Started

Family-owned businesses generate more than half of the country's GDP, and many prioritize charitable giving alongside profits. Helping your clients ask the right questions can make a big difference in the success of their corporate philanthropy programs. Don't miss these useful tips on how to guide the conversation. [Read More](#)



Helping Clients Gift Hard-to-Value Assets: From Real Estate to Cryptocurrency

Gifting "hard-to-value" assets such as works of art can offer significant benefits to both donors and charities. We've created a short primer on navigating the universe of non-cash assets for clients who want to make non-cash gifts. [Read More](#)



Donor-Advised Fund or Private Foundation: Which is Better for Older Donors?

In the coming decades, Baby Boomers and older Americans are poised to transfer an enormous

amount of wealth—including trillions of dollars that will flow to charities. Here are some key talking points when advising clients on the best charitable giving vehicles to achieve their goals. [Read More](#)



Events



Hawai'i Gift Planning Council 2022 Annual Conference

Co-hosted by Hawai'i Community Foundation, the Hawai'i Gift Planning Council's 2022 annual conference will be held March 10, 2022, at the Oahu Country Club.

Whether you're just starting a gift planning program or have a specialized gift planning office, this year's conference has something for everyone. Fundraisers, board members, executive directors, and professional advisors are welcome!

The conference will feature Trever Asam, Esq., partner at Cades Schutte, Rebecca Bibleheimer, senior complex gifts officer for the Oregon Community Foundation, and Tracy Malloy-Curtis, legacy giving director with Mal Warwick Donordigital.

Event check-in opens at 8:45 a.m., with conference sessions and networking from 9 a.m. to 5 p.m.

[Learn More](#)



Resources

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