HAWAIʻI COMMUNITY
FOUNDATION

Practical Tips On How To Connect With Professional Advisors

(11-1-17)

1. **Know Your PA Audience**
    a. *Determine Your Definition*

        EXAMPLE: *"A professional advisor is an attorney, accountant, financial advisor, insurance advisor, wealth advisor, banker, trust officer and anyone who in their professional capacity refers a prospect to [YOUR ORGANIZATION]"*

    b. *Appreciate the Differences Between PA roles* - For attorneys/accountants, time is their commodity, but not the proposed gift. In contrast for financial advisors/wealth managers, the proposed gift may be their commodity and not their time.

2. **Appreciate the PA Perspective**
    a. *Trust & Integrity* - Can you to do right by them and their client? Is it all about you and your organization?

    b. *Know Thyself* - Can you articulate when asked a compelling story, your mission and key developments and how that information relates to their practice?

    c. *Reputation & Referrals* - How might you help to enhance their reputation? Can you refer work or otherwise help them build their practice?

3. **Show Appreciation of the PA Perspective**
    a. *Decide Who to Focus on* - Your time is limited; consider segmenting your PAs.

    b. *Find the Mission Aligned* - They are out there. Enlist them.

    c. *Personal Contact* - Wine & Dine vs. Coffee & Croissant. Just keep it simple.

    d. *Standard Resources* – Be able to provide your legal name (including DBA, if any); FEIN; newsletters; sample language; resource materials; illustrations, etc. Don't sweat doing it all. Just do what you can to deepen the relationship.

    e. *Educational Events* - Too much time/expense? Consider co-hosting with other groups. Topics should add value to the PA, not just to your organization.

    f. *Recognition* - Please and thank you go a long way. Internal get-togethers with Board members who are PAs. Signature event? Consider something small, then build on it. Make it fun!