

FALL 2021



HAWAI'I COMMUNITY
FOUNDATION

Advisor Insights

Quarterly News & Resources for Professional Advisors

Aloha Advisor,

In this season of gratitude, I'm reminded how lucky I am to work with a dedicated community of professional advisors. Your knowledge and expertise help guide donors' generosity where it will do the most good for our community. It is an honor to work with you and your clients, and I can't wait to see what we achieve together moving forward - Pūpūkahi i holomua.

In this edition of Advisor Insights, we're sharing more information and tips we hope you'll find helpful in your work, along with news and updates about Hawai'i's Advisor community.

We've faced unprecedented challenges over the past two years, but we've been able to get through them by working together. We want to continue partnering with you to serve our community, so please reach out with questions, comments, and suggestions.

Wishing you, your staff, and your 'ohana a happy holiday season and good health and success in 2022.

Aloha,

Jen-L W. Lyman

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Latest News



PLANNED GIVING TIPS: Advising Clients on "Giving While Living"

Americans' bequests to charity totaled nearly \$42 billion last year. That's a tremendous amount of charitable giving flowing to community organizations from donors after they die. Still, it's a fraction of the more than \$324 billion in 2020 donated by living individuals.

As you work with your clients, including the benefits of building philanthropic components into their estate plans for distribution after death is important, but also be sure to help your clients make meaningful gifts during their lifetime. [Read more](#) for tips on talking to clients about giving while living.



Tax Smart Charitable Giving, Especially With Retirement Assets

On September 23, the Hawai'i Community Foundation and Hawai'i Estate Planning Council hosted a webinar with guest speaker Christopher R. Hoyt, J.D., Professor of Law at the University of Missouri Kansas City School of Law. If you're interested in viewing or sharing the webinar, you can find Professor Hoyt's presentation [here](#).



Professional Advisors in Philanthropy Celebration

This year's event was held on November 5 and honored Judy Y. Lee, Esq. and Gayle S. Tasaka, CPA for their professional and personal impact on philanthropy in Hawai'i.

The 2021 celebration also featured an inspirational talk by Laura Beeman, head coach of Rainbow Wahine Basketball at the University of Hawai'i at Mānoa. Coach Beeman spoke on the topic, "Finding Relevance During Uncertainty."

The annual event recognizes the contributions of Hawai'i professional advisor community in guiding and inspiring charitable giving throughout our state.

Watch a recording of this year's celebration [here](#).



Advisor Highlight

Giving with Gratitude



Honolulu estate attorney Judy Lee was raised with a spirit of giving— "my mother taught me that it is a blessing to give," she says. [Read on](#) to learn more as our 2021 Professional Advisor Awardee shares what inspires her, and the principles that drive her approach to philanthropy.

Making a Difference, Together



“No matter how much you have to give, anyone can make a difference by working together,” says Honolulu CPA Gayle Tasaka. [Read on](#) to learn more as our 2021 Professional Advisor Awardee shares her approach to helping clients meet their charitable giving goals.



Resources

Smart Year-End Ideas

The holiday season is a busy time for year-end gifts. Help your clients make the most of their giving with a few of these [smart ideas for 2021](#).

2021 Giving and Grant Recommendation Deadlines

We've pulled together exclusive tools and tips to help you better serve clients with their charitable giving needs on our professional advisors' [webpage](#) and mobile [app](#). You can find end-of-year deadlines [here](#) to help meet tax year requirements for charitable gifts.



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