

SUMMER 2022



HAWAI'I COMMUNITY
FOUNDATION

Advisor Insights

Quarterly News & Resources for Professional Advisors

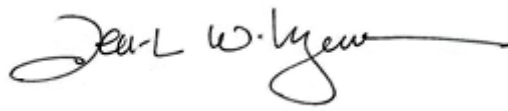
Aloha <<First Name>>,

As we continue to adapt to the ups and downs of the COVID-19 pandemic, high inflation, and stock market volatility, I reflect on the many hands that have been working together to bring us this far. Laulima kākou—many hands make light work.

We're honored to work with so many attorneys, accountants, bankers, and financial advisors who are committed to helping their clients achieve their philanthropic goals. Every day, we are inspired by donors who tell us how grateful they are for the strong relationship between you, as their trusted advisor, and our team, as a trusted source for community knowledge and charitable gift planning.

In that spirit, we publish this quarterly newsletter to help you stay current on the charitable giving topics that matter most to your philanthropic clients. In this issue, we're highlighting August as National Make-A-Will month, which is a great reminder to your clients to start thinking about their estate plans. We're also highlighting ways to support post-secondary learning and career readiness and protecting Hawai'i's fresh water. Our goal is to provide helpful resources that add value to your work.

As always, we're available to answer your questions about philanthropy. We recently reopened our newly renovated headquarters at the historic C. Brewer and Co. Building in downtown Honolulu, and would be happy to schedule a meeting with you at our offices to get to know you and learn how we can be a useful, behind-the-scenes resource for you and your clients.



Jen-L W. Lyman

Director of Planned Giving & Advisor Relations

Hawai'i Community Foundation

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Latest News



The Hawai'i Community Foundation Welcomes You Back!

Let's reconnect—our newly renovated offices are now open! To reconnect and make a visit, contact Jen-L W. Lyman, Director of Planned Giving and Advisor Relations, at (808) 566-5596 or jlyman@hcf-hawaii.org. [See More](#)



Back to Basics: Reminding Clients about Wills, Trusts, and Charitable Bequests

August is National Make-A-Will month and it's a great time to remind your clients to keep their estate plans up to date and review their plans on a regular basis. [Read More](#)



Thinking Differently About Scholarships Can Make All the Difference

According to statistics gathered by the National Scholarship Providers Association, approximately \$100 million in scholarship money is left sitting on the sidelines each year, [unused](#). How do you help clients who wish to support education create scholarships that are put to good use and not left unspent? [Read More](#)



Impactful Philanthropic Investments for your Clients: Protecting Hawai'i's Fresh Water

Rainfall in Hawai'i has decreased by 23 percent over the past 30 years, while the Islands' population has continued to grow, by almost 25 percent over the same period. To address this potential fresh-water crisis, HCF created the Wai Maoli: Hawai'i Fresh Water Initiative to protect Hawai'i's fresh water in the years ahead. [Read More](#)



Events



COUNCIL: When a Charity Becomes a Chore: Private Foundation Alternatives

Tuesday, September 20, 2022, noon to 1:30 p.m.
Location: TBD

Join speakers Trever Asam, Esq., partner at Cades Schutte, Kawena Beaupre Esq., VP and general counsel at HCF, and Jen-L Lyman, Esq., HCF director of Planned Giving and Advisor Relations, as they discuss the pros and cons of creating and operating a private foundation, share reasons why charities become a chore for some families, and talk through the termination/dissolution of a charity and charitable alternatives.

For more information and to register, visit hawaiiestateplanningcouncil.org. Must be a HEPC member or guest to attend.

The Scholarship Role in the Academic Journey

Wednesday, September 21, 2022, noon to 1 p.m.



This hour-long webinar will explore how scholarships influence a student's academic journey through the experiences of a high school counselor, a college financial aid officer, and a student.

Invitations will be sent to scholarship donors and others by the end of August. To be sure you're included, please email Martha Hanson at mhanson@hcf-hawaii.org.



HAWAI'I COMMUNITY FOUNDATION: Professional Advisors in Philanthropy Celebration

Thursday, October 27, 2022, 5 to 7:30 p.m.

SAVE THE DATE to join us and celebrate the 2022 Outstanding Professional Advisors in Philanthropy. Don't miss this opportunity to network with colleagues and community leaders. After celebrating virtually these past two years, the 2022 celebration will be in-person once again. Invitations and details to follow.



59th Annual Hawai'i Tax Institute

November 6-10, 2022
Hilton Hawaiian Village

The Hawai'i Tax Institute is pleased to announce the return of their live in-person conference in the heart of Waikīkī, with nationally and internationally acclaimed speakers. [Click here](#) to register. Registration is limited.



Resources

Visit HCF's [professional advisors webpage](#) or [download our mobile app](#) for useful, exclusive tools and tips to help you better serve your clients. With your busy

schedules, we want our resources to be accessible and informative—and spark inspiration that you can bring into your practice.

[View Resources](#)



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