

SUMMER 2023



HAWAI'I COMMUNITY
FOUNDATION

Advisor Insights

Quarterly News & Resources for Professional Advisors

Aloha <<First Name>>,

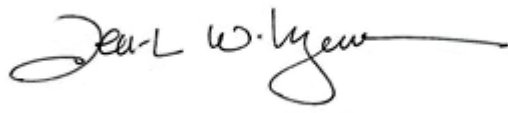
In these challenging times, we extend our heartfelt sympathies to our Maui and Hawai'i Island communities and 'ohana who have been profoundly affected by the devastating fires. The loss and heartbreak that these communities are facing is immeasurable, and our thoughts and prayers are with all those who have been impacted.

Amidst the challenges and losses, we want to share a glimmer of hope. The Hawai'i Community Foundation has taken action to activate its **Maui Strong Fund**, which provides essential resources for disaster response and recovery, aimed at helping the affected communities rebuild and recover.

In this issue of Advisor Insights, we hope to share a few bright spots and tips to help you and your clients build connections through philanthropy, legacy giving, and artificial intelligence. Our Advisor Highlight featuring financial advisor Gregg Takara will also leave you inspired to support your clients with winning solutions.

Mahalo for your ongoing support to serve your clients and our community. Please don't hesitate to reach out if you have questions, comments, and suggestions.

With gratitude and aloha always,



Jen-L W. Lyman

Senior Director of Gift Planning & Advisor Relations

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Latest News



Building Emotional Connections: Philanthropy and its Role in Families

Embracing the power of philanthropy is an important tool for nurturing stronger, more connected families.

[**READ HERE**](#)



Legacy Giving: A Conversation that's Full of Opportunity

Leaving a legacy gift through a will or trust is a powerful testament to one's values and enduring impact. [**READ HERE**](#) for helpful tips when discussing legacy charitable gifts with your clients.



Advising clients about AI's impact on charitable giving

Artificial Intelligence has changed the way some of us work - personally and professionally. [**READ HERE**](#) for tips on client queries about how AI might impact your clients' philanthropy plans.



Advisor Highlight

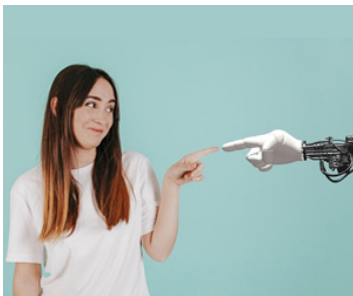
Learning from Experience: Win-win Strategies for Giving



Gregg Takara has seen it all in his 30 years as a financial advisor. [READ HERE](#) to learn how Gregg's experience of needing help for a family member inspired him to help others – a win-win for the community.



Events



In Case You Missed it:

Webinar AI Chatbots: The New Frontier

In July, we held a webinar on A.I. chatbots with Ryan Ogawa, founder of Hawai'i Hui, and Ryley Higa, senior machine learning engineer with Sumo Logic, who gave a live Chatbot demonstration and discussed some of the technology's potential uses, advantages, and legal pitfalls. If you weren't able to join us, we've got a recording of the session for you to check out, [here](#).



60th Annual Hawai'i Tax Institute Conference

November 5-9, 2023

Sheraton Waikīkī

Join us in attending one of the nation's premier tax and wealth transfer conferences with nationally and internationally acclaimed speakers – [click here](#) to register



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, informative and spark inspiration that you can bring into your practice.

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