

WINTER 2022



HAWAI'I COMMUNITY
FOUNDATION

Advisor Insights

Quarterly News & Resources for Professional Advisors

Aloha <<First Name>>>,

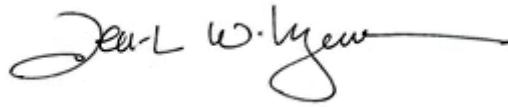
Happy Lunar New Year (Xian Nian Kwai Le) and Kung Hee Fat Choy (happiness and prosperity)!

A new year means new connections, inspirations, and resolutions. For some, this may mean making a promise to yourself to eat healthier, exercise more, learn a new hobby, or make time for others.

For me, a new year means choosing one word to guide my focus, intentions, and hope for the year. Last year, my word was *laulima*, which is tied to the idea of cooperation and the power of people working together. For 2023, my word is "***pilina***:" "to make connections" or relationships. Pilina is rooted in the word *pili* which means binded together and connected. Pilina is an important value in Hawaiian culture because having a strong pilina within your family, co-workers, or community allows you to achieve amazing results together.

In the spirit of pilina, this issue of Advisor Insights connects you with Outstanding Professional Advisor in Philanthropy Trever Asam and the work he does for his clients and the community. We also share tips and ideas to help you counsel your clients about nonprofit organizations and start to develop an annual giving plan with your clients.

We are excited for the amazing things we can do together for your clients and the community and look forward to continuing to serve you with aloha in 2023!



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Latest News



[Valuable Conversations: Why it's smart to talk with your clients about charitable giving](#)

The new year is a good time to start helping your clients plan for their annual giving. The greatest needs are right here at home, and working with HCF ensures your clients are informed and impactful philanthropists.

Read More for ways we can work with you and your clients to implement their charitable giving goals.



[Counseling your Clients about Nonprofits: The good, the bad, and the big leaps](#)

As an advisor, you are more likely than ever to represent clients who hold executive positions at nonprofits, serve in key roles on nonprofit boards of directors, or do business with nonprofit organizations.

Read More about the types of issues that come up in the nonprofit arena and how HCF can be a resource to you.



[Simplifying Private Foundations—Why a DAF Might Be Your Client's Best Option](#)

Private foundations are powerful giving vehicles ripe with benefits for founders, trustees, and nonprofit grant recipients. However, they also come with challenges that make them a less-than-perfect solution in many cases. To learn more about what you need to know about private foundations, and how a donor advised fund might offer a simpler path to philanthropic success, [check out this explainer article](#) by Cami Matson of the San Diego Foundation.



Advisor Highlight

Greater Good for our Community:
Private Foundations vs. Donor Advised Funds



Your client may want to set up a private foundation to accomplish their philanthropic goals. But is it really the best move for them? Trevor Asam shares his insights on how to choose the best charitable vehicle for the situation. [Read More](#)



Events



Hawai'i Gift Planning Council 2023 Annual Conference

Co-hosted by the Hawai'i Community Foundation, the Hawai'i Gift Planning Council's 2023 annual conference will be held on March 2, 2023, at O'ahu Country Club.

The conference will feature Trever Asam, Esq., partner at Cades Schutte, Donna M. Bandelloni, senior consultant, Heaton Smith, and Kirk Ross, senior trust advisor, Fifth Third Private Bank.

Learn useful tips and techniques from an expert in providing federal tax updates and developments for tax-exempt and nonprofit organizations. Guest speaker Kirk Ross will share how to take a deep dive to explore donors' non-cash assets, and how to initiate meaningful, personalized conversations with donors to understand their motivations and charitable giving needs.

Event check-in opens at 8:30 a.m. with conference sessions and networking from 9 a.m. to 5 p.m.



Education Seminar: What To Do Now: Estate and Gift Planning in 2023

Friday, March 3, 2023 at noon, HST

Guest speaker Kirk Ross, a senior trust advisor with Fifth Third Private Bank in Toledo, Ohio, will provide several tips and techniques to help advisors navigate the uncertainty of the nation's political and economic outlook and increase their ability to add flexibility to clients' legal and philanthropy plans, including addressing changes from the SECURE ACT 2.0. To RSVP, [click here](#).



Resources

Visit HCF's [professional advisors webpage](#) 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.

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