

SPRING 2023



HAWAI'I COMMUNITY  
FOUNDATION

# Advisor Insights

*Quarterly News & Resources for Professional Advisors*

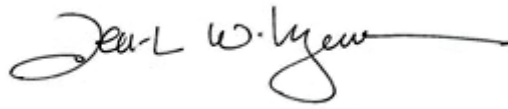
Aloha <<First Name>>>,

We hope tax season has treated you and your clients well. As tax time comes and goes, we look ahead to spring, "where flowers bloom and so does hope," as Lady Bird Johnson said.

For me, the arrival of spring means longer days, softball season, and setting aside some time for spring cleaning to tackle household chores and projects. While checking items off your to-do list, spring is the perfect time to refresh your clients' financial and estate plans.

In this issue of Advisor Insights, you'll find a few spring must-haves to keep you on your (charitable tax) toes and to help your clients refresh and clean up their estate plan and charitable giving strategy. We've also got an article with Maui estate-planning attorney Gloria Buckingham, sharing how she helps her clients give back to make the greatest impact in the community.

Mahalo for your partnership. We look forward to being a charitable resource to support you in helping your clients refresh and spring forward in 2023.



**Jen-L W. Lyman**

*Senior Director of Gift Planning & Advisor Relations*

*Hawai'i Community Foundation*

(808) 566-5596

[Jlyman@hcf-hawaii.org](mailto:Jlyman@hcf-hawaii.org)



## Latest News



### Tax tips to keep you on your toes

**Read Here** for some tax tips to keep in mind for 2023, including watching out for how to stay within IRS-exempt purpose requirements and how to avoid sketchy charitable remainder trust set-ups.



### Spring Cleaning: Time to clean up estate plans

Spring cleaning your clients' estate plans now means they can head into summer fun and activities with this important task off their to-do list!

**Read Here** for items for your clients to consider when refreshing and updating their estate plans.



### Spring Cleaning: How to help clients organize their charitable giving

Now that most of your clients' 2022 tax filings are done, it's a great time to proactively help organize their charitable giving.

**Read More** about how bringing up the subject of charitable giving can pave the way for a conversation

about why your client needs a comprehensive estate and financial plan.



## Advisor Highlight

### The Benefits of Giving Local



For this Maui attorney, learning more about the local and grassroots nonprofits in her community is the key to effective philanthropy. [Read More](#) about how Gloria Navarro Buckingham helps her clients reach their philanthropic goals.



## 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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