

WINTER 2023



HAWAI'I COMMUNITY
FOUNDATION

Advisor Insights

Quarterly News & Resources for Professional Advisors

Aloha <<First Name>>,

As we bid farewell to an eventful 2023, we eagerly anticipate the opportunities that lie ahead in 2024. At the heart of it all is our commitment to strengthen our partnerships and build enduring connections. 2024 holds the promise of growth, collaboration, and shared success.

In the spirit of the Chinese Lunar New Year, we welcome the year of the dragon – a symbol of strength, wisdom, and prosperity. The year of the dragon encourages us to be ambitious, creative, and strong in facing challenges. By setting big goals, being imaginative, staying resilient, building good connections, and balancing our efforts, we can make this year successful.

With this in mind, we share the latest tax developments in 2023 affecting charitable giving to keep your eye on in 2024, tips for your client's charitable giving in 2024, and an update on our Maui Strong Fund. Our Advisor Highlight in this edition features HCF SVP and General Counsel Kawena Beaupre sharing how her college advisor impacted her life and the qualities to look for in an exceptional advisor.

Last year was a hectic one, so my word for 2024 is Ho'omau – perseverance and resilience. *E ho'omau kākou i ka hoe pū 'ana* (let's keep paddling together). Let's keep the aloha spirit alive and start the year off by leveraging our collective expertise to overcome obstacles and create lasting value. We look forward to another year of shared accomplishments and meaningful collaborations as we all keep moving forward together!

Wishing you a prosperous Year of the Dragon and a rewarding 2024!

With gratitude and aloha always,



Jen-L W. Lyman

Senior Director of Gift Planning & Advisor Relations

Hawai'i Community Foundation

(808) 566-5596

Jlyman@hcf-hawaii.org



Latest News



[Tax Law Twists and Turns: Five Developments Impacting Charitable Giving](#)

2023 was a busy year! We understand that charitable giving topics may not always be at the top of your reading list. [READ HERE](#) for a recap of five key developments last year that are worth keeping an eye on in 2024.



[Clean Slate: Tips for Charitable Giving in 2024](#)

The lunar new year is such a great time to plan and reboot, offering a clean slate for “to do” lists, goals, and to support your clients’ overall mindset.

As you help your clients think about their financial goals and priorities, [READ HERE](#) for a few charitable giving tips for your clients to consider.



[Update: Maui Strong Fund](#)

In the aftermath of the devastating August 2023 fires, donors from around the world embraced Maui, offering aloha and financial resources for recovery through HCF's Maui Strong Fund. [READ HERE](#) for HCF's 6-month update on the fund's current status, and highlights from a few of the more than 150 Maui Strong Fund grantee partners who are having an impact on the people and places affected by the disaster.



Advisor Highlight

Guiding Giving: Qualities of an Exceptional Advisor



A good advisor can impact the course of someone's life. [READ HERE](#) to learn how an advisor shaped HCF Senior Vice President and General Counsel Kawena Beaupre's education and career path, and how the lessons she learned reflect our work at HCF.



Events



Connecting for a Stronger Hawai'i- Stories of Impact:

February 29, 2024

(Donor Lunch Exclusive)

Hawai'i Community Foundation and PBS Hawai'i join for an exclusive behind-the-scenes tour of PBS Hawai'i Studios and a talk story with CEOs and Presidents Micah Kāne and Ron Mizutani sharing how each of their organizations connect with the community to make a lasting impact for a better Hawai'i.



Hawai'i Gift Planning Council 2024 Annual Conference:

March 7, 2024

Co-hosted by the Hawai'i Community Foundation, the Hawai'i Gift Planning Council's 2024 annual conference will be held March 7, 2024, at O'ahu Country Club.

The conference will feature Trever Asam, Esq., partner at Cades Schutte LLP, and Pamela Jones Davidson, JD.

Join and learn about the latest federal tax updates for tax-exempt and nonprofit organizations, promoting planned gifts, and optimizing strategies for your charity's financial future.

Event check-in opens at 8:30 a.m. with conference sessions and networking from 9 a.m. to 5 p.m. Registration deadline: March 1, 2024. Click [HERE](#) for registration and speaker information.



Legacy 102: Lessons Learned in Trust and Estate Administration:

March 14, 2024

(Virtual Webinar)

Join speakers **Kawena Beaupre**, Senior Vice President & General Counsel, Hawai'i Community Foundation, **Jen-L W. Lyman**, Senior Director of Gift Planning & Advisor Relations, Hawai'i Community Foundation, and **Kevin Shiinoki**, Principal at Legacy Works, as they share the essential steps of trust administration, lessons learned, and common mistakes you'll want to avoid. RSVP [HERE](#) to register.



Resources

Visit HCF's [professional advisors webpage](#) for useful tools and tips to help you better serve your clients. With your busy schedule, we want our resources to be accessible and informative—and spark inspiration that you can bring into your practice.

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