HAWAI'I COMMUNITY FOUNDATION

Helping your clients achieve their charitable goals

When it comes to philanthropy, clients want informed advice and effective solutions that enable them to achieve their financial goals, make tax-wise decisions, and have the most impact on the issues and organizations they care about. We can help.

At Hawai'i Community Foundation

We will...

Work with you to find the best charitable solutions for your client.

Provide support, information, and expertise related to charitable giving options, including sample bequest language, and complex gift calculations and illustrations.

Help you connect across generations as your family philanthropy resource.

Offer community knowledge, confidentiality, and objectivity.

Financial Solutions through Philanthropy

Here are some of the most common scenarios clients present to their professional advisors:

» **Year-end tax planning:** Your client wants to give back to the community but has no time to decide on the most deserving charities.

» **Legacy planning:** Your client wants to direct dollars for local benefit and hopes to have significant tax savings.

» **Research and Development:** Your client wants to understand the critical needs and opportunities in the state. HCF tracks trends and commissions studies, making us the go-to experts on charitable giving and community issues in Hawai'i.

» **Establishing a private foundation:** Your client is considering establishing a private foundation but is looking for a simpler, more cost-efficient alternative.

» **Sale or disposition of closely held stock:** Your client's personal net worth is primarily tied up in a closely held company, but it's important for them to give back to the community.

» **Sale of a business:** Your client owns highly appreciated stock in a company that is about to be acquired.

How to get started is up to you. We can meet with you to discuss how the Hawai'i Community Foundation can help you serve your clients. Please contact us at **donorservices@hcf-hawaii.org**.

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hawaiicommunityfoundation.org

Why should you talk to your clients about charitable giving?

According to the Philanthropic Institute, clients want their advisors to be more proactive in helping them plan their philanthropy. Many high-wealth individuals also increasingly expect their advisors to be able to assist them with strategic philanthropy and to bring up the subject as part of initial planning.

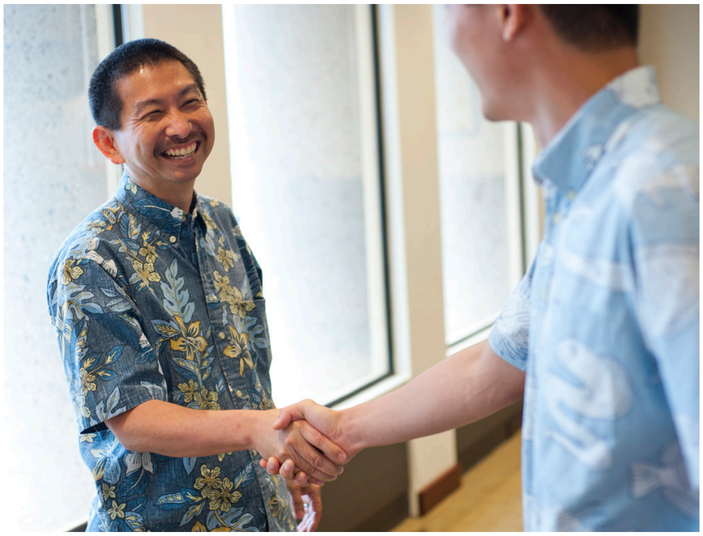
Questions to Launch the Charitable Conversation

Advisors frequently report that they would like to learn more about how to initiate a client conversation around charitable giving. Discussing philanthropy with your clients can be done in a way that respects their privacy, values, and autonomy.

HERE ARE SOME EXAMPLES OF QUESTIONS THAT ADVISORS HAVE USED WITH SUCCESS:

- **Beyond family and business, what is most important to you?**
- **Have you ever considered what kind of personal legacy you want to leave?**
- **Do you currently volunteer at or financially support any charitable organizations?**
- **When you think about the challenges facing your community, what are your major concerns?**
- **What would you like to accomplish with your giving?**
- **What do you think is possible?**
- **In the future, how do you want to be remembered by the community? By your family?**

Every client is unique, so there are many ways to raise the issue of charity. Not only does this practice hold the potential to build your business, but your professional expertise can help map your client's philanthropic journey to create tangible results in our communities, now and for generations to come.



Getting Started

Visit our website **hawaiicommunityfoundation.org** to learn more about the benefits of partnering with HCF.

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808-242-6184

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