

FALL 2023



HAWAI'I COMMUNITY  
FOUNDATION

# Advisor Insights

*Quarterly News & Resources for Professional Advisors*

Aloha & First Name>>,

As the year draws to a close, we find ourselves humbled and profoundly thankful for the unwavering support of advisors like you! We are invigorated by the aloha spirit, which continues to inspire us to strive for resilience and progress.

The past months have been a testament to the strength of our community and the **Maui Strong Fund's** ability to make a difference. It's through you and your clients' generosity and commitment that we have been able to provide hope and resources to those in need, helping Maui stand strong.

Speaking of resilience, this edition of our newsletter kicks off with an article by Mary Kelly, Commander, USN, CSP, CPAE, who delves into the vital topic of building resilience to prevent burnout, ensuring that we finish the year well. Next, we bring you valuable insights on tax deductibility for 501(c) organizations, providing you and your clients with the knowledge to make their contributions even more impactful. We also explore the concept of "catch-up" contributions and how they can enhance your giving potential. Finally, we take a look at how Melvin Y. Agena, one of our 2023 Outstanding Professional Advisors in Philanthropy, helps to find an "outside of the box" solution for homeless families in West O'ahu.

Mahalo for being the heart and soul of our community. Together we will end this year stronger than ever and we look forward to supporting you, your clients, and our community in 2024!

With gratitude and aloha always,



**Jen-L W. Lyman**

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## Latest News



### Building Resilience to Prevent Burnout

From pandemic to wildfires, it has been one disaster after another for our community. [\*\*READ HERE\*\*](#) for useful tips and tools from Mary Kelly, Commander, USN, CSP, CPAE to help prevent and overcome burnout.



### Clients Want to Know: What's Deductible and What's Not?

Whether you are an estate planning attorney, financial advisor, or accountant, you've probably seen an uptick in client questions about tax deductions—and tax rules in general—over the last few years. Tax law changes at the end of 2017 have caused a lot of ongoing taxpayer confusion. [\*\*READ HERE\*\*](#) to learn more about 501(c) tax deductibility.



## How Catch-Up Contributions Can Boost Client Giving

Catch-up contributions are more like bonus contributions for clients who already max out their retirement savings. [READ HERE](#) to learn how they can be a win for wealth building, family gifting, and charitable giving.



## HCF: Year-End Charitable Gifts and Grantmaking

Be sure your client's 2023 donation meets tax year deadlines! [READ HERE](#) for some tax-saving tips and important dates to keep in mind.



## Advisor Highlight

Turning an Idea into a Reality



When Melvin Y. Agena was confronted with the sight of a homeless toddler in West O'ahu, it stuck with him. [READ HERE](#) to learn how his idea to use cy pres funding to benefit the community became a reality.



## Events



### Professional Advisors in Philanthropy Celebration:

November 15, 2023

What an incredible evening celebrating four Outstanding Professional Advisors in Philanthropy with a theme of “E pilina mai no kākou” – let’s build connections. More than 100 attendees came together to honor these remarkable individuals and recognize the power of building meaningful connections. The event was a testament to the idea that by strengthening our pilina (connections and relationships), we can achieve extraordinary results together. To see unforgettable moments from our evening, check out our [photo gallery](#).



## 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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