

SPRING 2024



HAWAI'I COMMUNITY
FOUNDATION

Advisor Insights

Quarterly News & Resources for Professional Advisors

Aloha <<First Name>>,

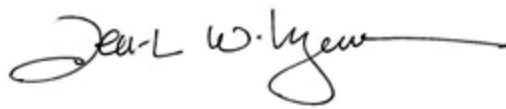
As we welcome the month of May, we find ourselves immersed in the spirit of celebration and reflection. May 1st marks a special occasion in the Land of Aloha as it is Lei Day in Hawai'i, a day deeply rooted in tradition and the spirit of aloha. It is a time when the islands come alive with vibrant colors and fragrant flowers, as people gather to honor the cherished tradition of giving and sharing lei as a symbol of love and aloha.

But May 1st holds significance beyond the shores of Hawai'i. For millions of high school seniors across the country, it is National College Decision Day. This day marks a pivotal moment in their lives as they announce their commitment to the college they will attend. It is a day filled with emotions, as families celebrate the culmination of years of hard work and dedication, while also coming to terms with the reality of empty pockets and bittersweet goodbyes.

In the spirit of aloha and the joy of the journey, our newsletter this month aims to embrace both the traditions of Lei Day and the significance of College Decision Day. We highlight scholarship giving's ripple effect, and offer insights and perspectives about why cash is not king and the sunset of the estate and gift tax exemption. Christopher Dang, Esq. is our Advisor Highlight this month sharing his aloha and expertise with his clients about giving through HCF.

Mahalo for partnering with us to serve our community. Wishing you a May filled with lei, laughter, and the promise of new beginnings.

With gratitude and aloha always,



Jen-L W. Lyman

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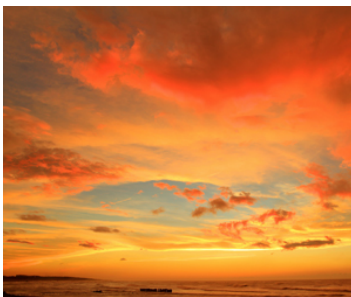


Latest News



The Ripple Effect of Scholarship Giving

READ HERE for a recap of the incredible results you and your clients helped HCF achieve for students in 2023.



Three Things to Help Navigate the Gift and Estate Tax Sunset

With gift and estate tax exemptions scheduled to sunset in 2026, now is the time to start planning ahead. **READ HERE** for important details and strategies to consider for your clients.



Gifts of Appreciated Stock: Let the Numbers Do the Talking

Cash is not always king when it comes to charitable giving. **READ HERE** for examples of how your clients can benefit from giving a more tax-advantaged option: appreciated stock.



Advisor Highlight

Scholarship Giving Made Easy Through HCF



Chris Dang, attorney, estate planner, and trustee, is familiar with the financial and emotional motivations for scholarship giving. [READ HERE](#) for his take on the easiest way to help your clients, and your own practice, to bring their scholarship intentions to fruition.



Events

IN CASE YOU MISSED IT:



Connecting for a Stronger Hawai'i- Stories of Impact: (Donor Lunch Exclusive)

On February 29, 2024, Hawai'i Community Foundation and PBS Hawai'i teamed up 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. Click [HERE](#) to view photos from the event.



Legacy 102: Lessons Learned in Trust and Estate Administration

(Virtual Webinar)

In March, we held a webinar on Trust and Estate Administration with 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, sharing the essential steps of trust administration, lessons learned, and common mistakes you'll want to avoid. If you weren't able to join us, you can view a recording [HERE](#), the slide presentation [HERE](#), and audience Q&A responses [HERE](#).



Eō Series: Maui Recovery Efforts

(Virtual Webinar)

Josh Green, M.D., Governor of Hawai'i, Richard Bissen, Mayor of Maui County, and Archie Kalepa, Lahaina Community Leader and Cultural Advisor, shared their reflections and updates on Maui's recovery following the devastating wildfires last August, with updates from HCF CEO and President Micah Kāne on the impactful utilization of donations to the Maui Strong Fund. The webinar was offered on April 18, 2024, as part of HCF's Eō Series, convening local experts and community leaders for perspectives on building a better, more vibrant, and equitable Hawai'i. Watch the recording [HERE](#).



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.

[View Resources](#)



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