

SPRING 2025

Hawai'i
Community
Foundation



Advisor Insights

Quarterly News & Resources for Professional Advisors

Aloha <<First Name>>,

As we welcome the fresh start of spring and close another busy tax season, we pause to reflect on the meaningful ways generosity can blossom in our community. This season reminds us of renewal and growth—and at the Hawai'i Community Foundation, we see that spirit alive in the work of professional advisors like you who help clients align their values with their giving.

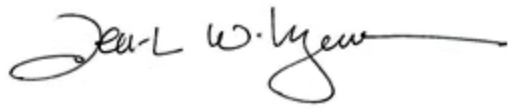
In this edition of *Advisor Insights*, we celebrate the many ways philanthropy strengthens our community—and the professionals who help make it happen. As Memorial Day approaches, we honor the courage and sacrifice of our military heroes with a special feature, *Honoring Our Heroes: Creating a Legacy of Support for Our Community*. We also highlight tools that go beyond the tax deadline—like donor advised funds and charitable gift annuities—that help clients give wisely and with heart.

We're also proud to spotlight attorney Kimberly A. Jackson, who not only introduces philanthropy to her clients as a path to lasting impact, but also leads by example. By establishing her own donor advised fund, Kimberly shares her authentic journey of giving and shows how philanthropy can be both personal and powerful. Fun fact: Kimberly is an author of several children's books, including the best-selling "Humu, the Little Fish Who Wished Away his Colors."

We hope the stories and strategies in this issue inspire new conversations with your clients and help them turn their charitable goals into lasting legacies.

As always, we're here to be your partner in philanthropy. Mahalo for the trust you place in us to serve alongside you and your clients.

With gratitude and aloha always,



Jen-L W. Lyman

Senior Director of Gift Planning & Advisor Relations

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Latest News



Honoring Our Heroes: Creating A Legacy of Support for Our Community

True heroes create lasting legacies. [READ HERE](#) to learn how to honor those who served by helping your clients turn gratitude into lasting impact to support Hawai'i's military and veteran community.



Beyond Tax Season: The Advantages of Donor Advised Funds

Donor advised funds offer your clients unparalleled flexibility, among many other virtues. [READ HERE](#) for a deep dive into the advantages of DAFs.



Charitable Gift Annuities: A Smart Giving Strategy with Lifetime Benefits

Charitable gift annuities are receiving renewed interest of late. [READ HERE](#) to find out why they're increasing in popularity and how you and your clients can take advantage of them.



Advisor Highlight

Making Philanthropy Personal



For Kimberly A. Jackson, Esq., estate planning is about heart, not just hard facts. One of HCF's 2023 Outstanding Advisors in Philanthropy, she blends legal expertise with deep compassion—guiding clients through loss, legacy, and giving back. [READ HERE](#) to learn how she introduces philanthropy at the right time and walks the walk in West Hawai'i.



Events

IN CASE YOU MISSED IT



Legacy 101: Estate Planning Basics (Virtual Webinar)

In April, we held a webinar on the fundamentals of estate planning with featured speakers Katherine A. Caswell, Esq., and Ginger Grinpas, Esq., of Kaua'i Estate Law, LLC, sharing the basics of wills and trusts, beneficiary designations, advanced medical

directives, common mistakes made, and the transformative power of legacy giving. If you weren't able to join us, you can view a recording [HERE](#), the slide presentation [HERE](#), and audience Q&A responses [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.

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