

SUMMER 2025

Hawai'i
Community
Foundation



Advisor Insights

Quarterly News & Resources for Professional Advisors

Aloha <<First Name>>,

This Year of the Snake has already proven to be a dynamic one—full of lessons, growth, and transformation. Like many of you, I've felt the highs and lows, both personally and professionally, and I find myself returning often to my word for the year: *mana'olana*—hope. Not just any hope, but the kind that lifts us with renewed expectation, reminding us that, even during life's heavy moments, there is always light and aloha.

Speaking of aloha, for the past eight years I've had the privilege of learning from and working alongside Micah Kāne, Hawai'i Community Foundation's CEO and President. Micah's steady leadership has guided HCF through some of Hawai'i's most challenging times—from the volcanic eruptions on Hawai'i Island and flooding in Hanalei, to the COVID-19 pandemic and the devastating 2023 Maui wildfires. In each crisis, he led HCF to respond swiftly and equitably, earning trust across communities statewide. We now bid a heartfelt a hui hou to Micah as he steps into a new chapter of community service on Hawai'i Island as Parker Ranch's CEO.

Stepping into the role of HCF CEO and President as of August 1 is Terry George, whose proven leadership, integrity, and deep commitment to Hawai'i will help guide us forward, alongside Michelle Ka'uhane, who has been elevated to our new Chief Operating Officer and Executive Vice President. Together, they bring renewed hope and vision for the work ahead as we navigate changes and challenges at the local, state, and federal levels to help make Hawai'i a better place for all.

In this edition of Advisor Insights, you'll find updates on the federal One Big Beautiful Bill Act and its implications for charitable giving, highlights from HCF's policy advocacy work at the state Legislature, and practical strategies to help your clients integrate philanthropy into their planning conversations.

Mahalo for the work you do every day to support your clients and our community. May we find beauty in growth, gratitude in service, and renewed hope in every moment we share. Let's keep leaning into mana'olana to guide our work forward:

“E ‘ae i ka mana‘o lana e alaka‘i i ko kākou hana.”

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



[The One Big Beautiful Act: Three Insights for Philanthropy and More](#)

The federal One Big Beautiful Bill Act, signed into law July 4, brings important changes that could reshape charitable giving strategies for years. [READ HERE](#) to learn more about the law's impacts.



[Policy Advocacy at HCF: Highlights from the Hawai'i State Legislative Session](#)

One of the ways that HCF works toward our mission of positive change in Hawai'i is through policy advocacy at the state Legislature. During this most recent 2025 legislative session, we were excited to see the successful passage of a few bills that we supported. [CLICK HERE](#) to learn more about these

policy wins, and how HCF engages with policy advocacy to help build equity in our communities.



[Planning Ahead For Fall](#)

With fall planning season approaching, now is a great time to integrate charitable giving into your client conversations. [READ HERE](#) as we share practical tips and updates to help you guide clients seamlessly and strategically.



HCF Staff Highlight: Terry George

Meet our New CEO and President



On August 1, Terry George succeeded Micah Kāne as HCF CEO and president. A respected and seasoned nonprofit leader, Terry brings decades of experience working collaboratively across Hawai'i's nonprofit, government, and community sectors. His deep understanding of philanthropic foundations and their role in catalyzing impact makes him uniquely positioned to lead HCF into its next chapter. [READ HERE](#) to learn more about Terry's journey to HCF and his vision for HCF's future.



Updates and Events

UPDATES



Update: Enhancing Your Clients' Philanthropic Impact with New Fund Minimums

As part of our commitment to strong partnerships with professional advisors like you, we want to share an important update about HCF fund minimums that reflects our goal to maximize your clients' philanthropic impact. **The minimum to establish new funds at HCF increased from \$10,000 to \$25,000 for Designated, Advised Designated, Donor Advised, and Field of Interest funds (both endowed and non-endowed), effective April 1, 2025.** Note that there is no change to the Agency Endowment Fund minimum, which remains at \$50,000, or to Scholarship fund minimums, which remain at \$50,000 for endowed funds and \$15,000 for non-endowed funds.

All existing funds remain unchanged, and we encourage all donors to consider giving to **HCF's priority funds** at all giving levels. We're honoring all gifts that were being negotiated prior to this change (with documentation of pre-April 1st conversations). As always, we're available to help you navigate client conversations about this change and how it can enhance their strategic philanthropic vision. Please don't hesitate to reach out to Jen-L W. Lyman, Senior Director of Gift Planning and Advisor Relations, at (808) 566-5596 or jlyman@hcf-hawaii.org.

EVENTS



Lunch and Learn for Professional Advisors Community Foundation Policy Advocacy: Impact of State and Federal Legislation

Join us in-person as Justina Acevedo-Cross, HCF senior director of community strategy, shares how we work toward positive change through policy advocacy at the Hawai'i State Legislature. Guest speaker Jeff Hamond will also provide a virtual update from Capitol Hill on **H.R.1 – One Big Beautiful Bill Act** and its implications for philanthropy and estate planning.

8/28/25 – Maui @ Maui Arts & Cultural Center

9/5/25 – Kaua'i @ Wilcox Memorial Hospital

9/9/25 – O'ahu @ HCF C. Brewer Building

9/30/25 – Hilo @ 'Imiloa Astronomy Center



Professional Advisors in Philanthropy Celebration – **SAVE THE DATE**

October 21, 2025

Café Julia Courtyard

5– 8:30 p.m.

SAVE THE DATE to join us and celebrate HCF's 2025 Outstanding Professional Advisors in Philanthropy:

- **Rose-Marie Sam Esq.**
Partner, Goodsill Anderson Quinn & Stifel (O'ahu)
- **Keith G. Marrack**
Financial Advisor, Edward Jones (Hawai'i Island)
- **Gordon Y. Yee**
Financial Advisor, Yee Corp. (Kaua'i)
- **Kit Okazaki**
Insurance Agent, State Farm (Maui)

Don't miss the opportunity to network with colleagues, community leaders, and our HCF team.



62nd Annual Hawai'i Tax Institute Conference

November 2-6, 2025

Sheraton Waikīkī

Join us in attending one of the nation's premier tax and wealth transfer conferences with nationally and internationally acclaimed speakers. [CLICK 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.

[View Resources](#)



Copyright © 2025 Hawai'i Community Foundation. All rights reserved.
You are receiving this email because you signed up for updates regarding Hawai'i Community Foundation.

[Forward](#) this email to a friend

Our mailing address is:

Hawai'i Community Foundation
827 Fort Street Mall
Honolulu, HI 96813-4317

[Add us to your address book](#)

Want to change how you receive these emails?
You can [Unsubscribe](#)

This email was sent to <<Email Address>>
[why did I get this?](#) [unsubscribe from this list](#) [update subscription preferences](#)
Hawai'i Community Foundation · 827 Fort Street Mall · Honolulu, HI 96813-4317 · USA