



# Starting the Conversation

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## ***Do you know if your clients are charitably inclined?***

Starting with some simple questions to engage your clients on a deeper level by asking them about their charitable plans, can lead to larger discussions about how you can help clients maximize and simplify their giving,

*What charities do you currently support and how do you support them? What general causes do you care about?*

*What was your most important or most satisfying charitable donation or volunteer experience?*

*Do they have a private family foundation that has become too demanding, time intensive, and expensive? And do you want your family to be more involved in giving?*

*Are your clients holding appreciated assets, including publicly traded securities, and facing capital gains tax?*

Your clients can avoid capital gains tax and receive a tax deduction by donating these securities to an existing Fund or starting a Donor Advised Fund.

*Do you have clients who want to sell a business, or do your clients have illiquid assets they want to put to charitable use?*

We accept donations of a variety of assets, allowing your clients to receive maximum tax deductions.

*Do they want to leave a charitable legacy for future generations? Or engage their children in making a difference?*

*Are they concerned about how much to leave to children and favorite charities?*

*Are they anticipating a financial windfall and want to mitigate their tax burden?*

*Do they need IRA assets to maintain their lifestyle, or would they be interested in donating all or a portion of their annual distribution so that they don't pay taxes on them?*

*Do they want to give anonymously? Are your clients private about their wealth? And would they like to make anonymous grants to charities?*