community foundation

WHY WORK WITH US?

For Advisors

As a professional advisor, your clients rely on your guidance to make important financial decisions during key times in their lives. We are here to help you develop customized charitable giving strategies that meet your clients' planning needs and objectives at every stage of their lives.

Whether you are an attorney, estate planner, accountant or financial advisor, you always have your clients' best interests at heart. **So do we.**



With more than 50 years of experience, we know about giving, tax strategies, charitable planning and donor advised funds. The real value of working with the Community Foundation is that we are uniquely positioned to provide valuable knowledge and guidance on local community needs and areas of interest to your clients.

Our extensive experience extends beyond the mechanics of charitable giving to serving as your trusted philanthropic partner to maximize your clients' charitable impact. **Together, we do more good.**

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We Offer:

Personalized service

We work with you to develop a giving approach that matches your clients' interests as well as their tax-planning and family engagement needs.

Community knowledge

Our staff monitors community need: human services, education, the environment, healthcare, the arts, economic development, and more. We convene people and organizations to address issues and explore opportunities.

Investment expertise

Our signature investment partnership with Spider Management Company gives us access to a mature, well-diversified investment portfolio managed by seasoned staff with an excellent performance record.

Experience with non-cash gifts

In addition to gifts of cash and marketable securities, we accept gifts of real estate, closely held businesses and other non-cash assets. We also handle private foundation terminations.

Accountability & flexibility

1. We conduct a full review of all nonprofits prior to grant distributions.
2. Clients can access their fund information 24/7.
3. We can execute donor intent in perpetuity.

BENEFITS OF WORKING WITH THE COMMUNITY FOUNDATION



Your clients rely on you to help them make sound personal and financial decisions. By starting a conversation about their values and philanthropic goals, you can grow your business and deepen your client relationships.

The Community Foundation for a greater Richmond is a public charity that helps your clients achieve their philanthropic goals through personalized charitable funds. We are led by a volunteer Board of Governors and run by professionals with extensive knowledge of the community and the latest trends in philanthropy. We are committed to informing donors about the challenges facing our area and the promising initiatives underway to address these issues. You can feel confident that your client's charitable and financial goals will be our top priority. When the conversation turns to philanthropy, **everyone wins.**

> *I frequently work with clients to develop strategies for transferring wealth, and when I do, the Community Foundation is there to fill a key supporting role in handling the complex gifts that are often a part of these strategies. The Foundation is a true asset for our community."*
>
> **- Farhad Aghdami, Partner at Williams Mullen**

WHEN YOU PARTNER WITH US, YOUR CLIENTS' PHILANTHROPIC GIVING GOES FURTHER.

1. **We are a cost-effective resource for charitable planning.** We offer customized, tax-smart giving solutions to meet your client's needs.
2. **We accept a wide range of gifts.** From life insurance to stock to real estate, we make giving easy and ensure your clients receive maximum tax benefits.
3. **We respect your role.** As your clients' trusted advisor, our primary goal is to equip you with resources that will help you meet their financial and philanthropic goals.
4. **We simplify your paperwork.** We offer fund agreements tailored to your clients' unique wishes and situations.
5. **We offer unparalleled service.** We pride ourselves in a best-in-class customer experience and provide countless resources for advisors - all at no cost.
6. **We are experts on the Greater Richmond Region.** Our knowledge of the region's issues and nonprofits enables us to provide personalized grantmaking assistance.

For more information, please contact us at:
(804) 436-1600 | affiliates@cfrichmond.org