

- Embolden delivers new, timely content on the first day of each month.
- We'll email the content directly to your inbox, in a format like this (in Word).
- Cut and paste the material you want and ignore the rest.
- Use our design and format for inspiration, or use your own e-newsletter template.



Each newsletter will include 3 standard sections to create consistency and help set advisors' expectations:



The Community Foundation keeps you updated to help you serve your charitable clients.

[View this email in your browser.](#)



Hyperlinks to the sources are included in each update. Use our hyperlinks for inspiration, and be sure to swap out the links to our sample website for links to yours.

## Philanthropy in the News

### Donor-nonprofit relations can't be ignored

Donor intent has always been a driving force in case law involving the agreements between charities and donors. Advisors must work with clients to balance ethics, expenditure transparency, reporting back to donors, and incorporating flexibility to address changing needs over time. For insight into the growing issues concerning ethics in giving, you can track the developing story about the opioid crisis and its [ripple effect](#) that's forcing grantees of a family's philanthropy to face tough decisions.

#### HOW WE CAN HELP

Your clients want to make a difference by supporting important causes. The team at the Community Foundation keeps its [finger on the pulse](#) of



Each section will include a "HOW WE CAN HELP" section to connect the advisor with the community foundation's services. This section can be cut out, of course, depending on the level of promotion desired.

our community to help you and your clients structure grants and charitable giving plans to improve the lives of people in our region. Our expertise enables us to work with you to help your clients navigate relationships with favorite nonprofits.

## 2017's tax cuts are still a hot topic in the philanthropy world

The buzz continues to grow among policy makers who are beginning to project how proposed tax law changes might help prevent anticipated declines in charitable giving resulting from the 2017 Tax Cuts and Jobs Act (TCJA). Take a quick glance at the [Independent Sector's report](#), released this month, for an overview of emerging policy change options that could impact the way you assist your charitable clients with tax planning.

### HOW WE CAN HELP

Whatever your clients' tax situations, our team is here to help you [design charitable giving plans](#) that meet their needs.

## Tax-Savvy Giving

### An oldie but a goodie

Even under the new tax laws, it's still a great strategy for clients to give shares of highly appreciated stock to a fund at the Community Foundation, receive a tax deduction, and then replace the stock outside the fund by purchasing more shares. This also increases the cost basis

of the client's portfolio, resulting in an additional tax benefit when the new shares are sold in the future.

#### HOW WE CAN HELP

Our team works alongside you to help a client [create a legacy](#) by establishing a fund to receive highly appreciated stock and accomplish charitable goals.

## **Creative Solutions**

### **Don't miss an opportunity to engage the next generation**

*InvestmentNews* revealed that as many as two-thirds of heirs wind up firing their parents' wealth advisors, largely due to the heirs' lack of connection to the advisor. How can philanthropy help? Charitable giving triggers strong emotions that can help you keep your practice connected to your clients across generations. When you work with your clients to incorporate favorite causes into their family legacies, you have the opportunity to extend the bonds of loyalty by encouraging your clients to include children and grandchildren in the discussions. This can help keep your expertise involved and relevant for years to come.

#### HOW WE CAN HELP

The Community Foundation has the tools to help you engage the next generation philanthropists. For example, parents and grandparents can give the [gift of a donor-advised fund](#) through the Community

Foundation. It's the perfect recommendation for your clients who ask for your help in getting their children involved.

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