

Making the Most of Charitable Financial Opportunities

The Community Foundation of Central Missouri is making it easier than ever for financial advisors to help their clients establish charitable funds.

Participating in the CFCM Financial Advisor Program creates a distinct advantage for you and your clients. You can continue to manage your clients' assets and, at the same time, meet your clients' tax and charitable goals.

Benefits

The Financial Advisor Program is a win-win for everyone involved, creating a significant and positive impact for your clients' charitable causes.

Financial Advisors can:

- Retain their clients' charitable assets at their financial institution and continue to manage their clients' charitable giving vehicles.
- Convert non-managed client assets, such as real estate, closely-held interests, businesses, personal property and art into charitable dollars that the advisor will manage.
- Offer clients a value-added service by connecting them to their local Community Foundation that has sophisticated knowledge about charitable giving and understands the needs of their community.

Identifying Clients Who Qualify

Candidates for this program might:

- Plan to sell a private company;
- Have high capital gains tax exposure;
- Be in a "transition" phase of life—empty nest, retirement, involved in estate planning;
- Want a charitable tax deduction now with the flexibility to make distributions in the future;
- Want to grow their contributions tax-free over time;
- Have a desire to give something back to their community, and/or
- Want to leave a legacy for future generations.

The Financial Advisor Program requires financial advisors to adhere to CFCM's professional and industry standards in managing donor funds. Statements are reconciled monthly between CFCM and financial advisors. Please contact the Executive Director at info@cfcfoundation.org for easy-to-use fund establishing forms, fees and other administrative details.