Professional Advisors and the Community Foundation

Luis and Karla work on a mural painted by a children's art class at the Fort Collins Museum of Contemporary Art, which received a grant from a Donor Advised Fund at the Community Foundation. Photo by Sherri Barber Photography.

Why Should Your Client Give Through The Community Foundation?

"As an estate planning attorney, I have found the Community Foundation to be a valuable member of a client's estate planning team. Their knowledge, expertise, and creativity have proven to be invaluable resources for us and our clients."

— Peter Scott, JD, LLM

Community Foundation of NORTHERN COLORADO

For **good.** For **ever.**®

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The Community Foundation of Northern Colorado helps people connect to the causes they care about most. When your clients give through the Community Foundation, they receive tangible benefits with long-term impact.

- **Personalized service**. The Community Foundation works closely with you and your clients to develop a giving approach that matches their personal interests and tax-planning needs. The Community Foundation staff can help integrate charitable giving within estate and financial plans, establish Donor Advised Funds named for your clients, facilitate anonymous giving, and assist with even the most complex gift instruments.

- **Local expertise**. The Foundation's professional program staff monitors all areas of community need—including human services, education, the environment, healthcare, the arts, and economic development. The staff can help your clients learn more about local agencies and programs that make a difference in the areas they care about most.

- **Community leadership**. The Community Foundation invests in the long-term vision for our region and brings people and organizations together, convening diverse voices to address local issues and opportunities. Our business is building community.

The Community Foundation has an outstanding reputation for integrity and service to donors, and has developed unique resources for you to use in helping donors craft their charitable giving plans. Working together, the Community Foundation can help your clients fulfill their philanthropic dreams.

To learn more about ways the Community Foundation can help you help your clients, contact our staff or visit the "Becoming A Donor" and "Professional Advisors" sections of www.CommunityFoundationNC.org. Register for our Professional Advisor e-newsletter at the bottom of the homepage.

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Developing a plan that takes into account your client's financial and charitable needs is no small task. The Community Foundation considers attorneys, accountants, financial planners, insurance agents, and other professionals who have relationships with donors to be valued partners in charitable giving.

CONTINUING EDUCATION

As part of an ongoing effort to nurture relationships with professional advisors, the Community Foundation hosts continuing education events for those interested in legal and accounting issues related to charitable giving. The seminars provide continuing education credits, and registration fees are kept to a minimum.

C. Jan Lord and Peter Scott

The Community Foundation has hosted Opportunities in Estate Planning since 2006. This two-day, highly-acclaimed program teaches CPAs, attorneys, financial advisors, and insurance representatives how to use proven, cutting-edge estate planning techniques to help their clients with the impending transfer of wealth from generation to generation. The presenters are C. Jan Lord, JD, and Peter Scott, JD, LLM (tax), AEP, CFP. Additional estate planning seminars and a Lunch and Learn series are planned for this year.

AMERICAN FUNDS PARTNERSHIP

Working together with community foundations across the country, American Funds has established a program that allows your clients to do the right thing for themselves and their communities while you continue to earn commissions and service fees.

Many community foundations have added the American Funds to their investment mix. This makes it possible for you to recommend philanthropic gifts that will bring your client tax benefits without reducing your eligible assets for service fees.

VOLUNTEER LEADERSHIP

The following professional advisors serve on Community Foundation boards and committees.

Attorneys

- Mo Heth (Loveland) - Investment Committee
- Don Johnson (Loveland) - Board of Trustees, Chair of Loveland Community Fund Committee
- Lucia Liley (Fort Collins) - Board of Trustees
- C. Jan Lord (Berthoud) - Community Fund Committee
- Eric Peterson (Fort Collins) - Chair of Fort Collins Community Fund Committee, Ad Hoc Supporting Organization Committee
- Randolph W. Starr (Loveland) - Community Fund Committee

Certified Public Accountants

- Roger Bates (Loveland) - Community Fund Committee
- Chris Otto (Fort Collins) - Community Fund Committee
- Mark Soukup (Fort Collins) - Board of Trustees, Chair of Investment Committee, Ad Hoc