



# "Giving" Advice



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FOUNDATION**  
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[TCF "GIVING" ADVICE  
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## ABOUT YOUR FOUNDATION

Since 1973, the **Toledo Community Foundation** has provided individuals, families and businesses interested in the well-being of our community with an *efficient, effective, low-cost, professionally managed* mechanism to achieve their charitable goals.

For philanthropists wishing to maximize the impact and life of their charitable gifts, the Foundation provides *resources for thoughtful giving*. Using its expertise and personalized services, **Toledo Community Foundation** helps donors transform their philanthropic impulse to measurable

Challenging economic conditions are forcing donors to make tough decisions about how much—if any—they can give to their preferred charities. This month, we discuss the benefits of working with community foundations to make philanthropic goals a part of a long-term financial plan, along with clients' retirement and estate planning strategies. This issue's news section examines, among other topics, how considering the more interpersonal side of your inheritance plan can curtail family feuds.

**While these articles may mention creating private foundations for your clients, keep in mind that the Toledo Community Foundation's most flexible service is the donor advised fund. A donor advised fund at the Foundation affords the personal involvement and flexibility of a private foundation, but with much greater ease and, often, superior tax benefits. They can be used for a donor's personal use, family use or a means to establish a corporate or business program.**

## Upcoming Event

Just a reminder to mark your calendar for the morning through lunch time on **Thursday, October 29, 2009** to hear Chris Hoyt, professor at the University of Missouri (Kansas City) School of Law. This continuing education seminar, to be held at the Hilton Garden Inn (Levis Commons), is co-sponsored by a number of local organizations. Look for a mailing soon with details of the event. If you have any questions in the meantime, please contact Bridget Holt or Kris Theisen, donor relations officers at the Foundation, at 419.241.5049.

As always, please contact us with your comments and questions.

## ► *Features*

### [Make Giving Part of a Financial Plan](#)

When you include your clients' existing philanthropy activities in their long-term investment strategies, you're helping them maximize tax benefits while generating goodwill.

## ► *News*

community impact. Beyond the gifting of assets, the Foundation helps donors identify issues of importance to them and *inspires engagement* with community organizations addressing these issues, thereby maximizing the impact of charitable gifts and creating a greater sense of fulfillment.

### [More Wealthy Americans Donating Through Foundations](#)

*The Bradenton Herald*, June 2009

Charitable giving lets you divvy up your money to the organizations you think need it the most. It also lets you reap the benefits of tax deductions.

### [Foundation Grants Require More Due Diligence](#)

*Dow Jones News Service*, July 2009

With new IRS guidelines now in effect, playing by the rules can help save individuals with donor advised funds time and money when deciding on the charities to which they can grant funds.

### [Make Moves to Benefit Family You Leave Behind](#)

*News-Press*, June 2009

Arranging your finances properly can ease the process of passing assets along to family members—as well as help avoid some taxes.

### [The Evolution of Estate Planning](#)

*Accounting Today*, June 2009

President Obama's reforms will most likely mean major changes in tax policy and traditional estate planning. For those who are prepared, it will also be a time to take advantage of new opportunities.

### [Don't Forget the Human Side](#)

*Fortune*, June 2009

Sibling rivalry and past gifts to children are factors to consider when thinking about the human side of your estate plans. After all, you want your family to benefit from your inheritance plan, not be torn apart by it.

### [Charity Board Members Focus on Taxes](#)

*Dow Jones News Service*, June 2009

Can an individual charity board member be personally liable to the IRS for that nonprofit's finances? According to a recent court decision, the answer is yes—and it's a good reason to take the proper steps to make sure business is conducted correctly.

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