



*Inspiring and Connecting Thoughtful Giving*

### Toledo Community Foundation



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#### About Your Foundation

Since 1973, **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 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.

In our news roundup this month, you'll find timely articles on philanthropic, retirement, and estate matters from some of the world's best news sources.

#### Upcoming Events:

(1) On Friday, **Sept. 23**, the Foundation will host a free continuing education seminar on Business Succession Planning Using Charitable Techniques, featuring attorney Michael Bourland (Fort Worth, TX). Mr. Bourland, a specialist in the area of business succession planning, will provide case examples and detailed information as to the use of charitable tax planning techniques in business succession plans. This seminar is perfect for professional advisors assisting small and medium sized business owners who are thinking about transitioning their business to family members and/or outsiders.

The seminar will be followed by a lunch with Mr. Bourland for professional advisors and their clients. A more detailed invitation to the seminar and lunch will be mailed later this summer.

*For further information, please contact either of our Philanthropic Services Officers at 419.241.5049, or email Bridget Brell Holt at [Bridget@toledocf.org](mailto:Bridget@toledocf.org) or Kris Theisen at [Kris@toledocf.org](mailto:Kris@toledocf.org).*

(2) The Foundation, Toledo Area Partnership for Philanthropic Planning, Toledo Estate Planning Council, Financial Planning Association and Society of Financial Service Professionals are partnering to host a **Nov. 2** continuing education seminar for professional advisors from 7:30 a.m. - 2:45 p.m. at The Pinnacle in Maumee. Speakers include Alan Lenihan from Fund Evaluation Group, LLC on Alternative Investments; Tom Rogerson from BNY Mellon on Family Wealth-Philanthropy; David Hammack from the William Vaughan Company on Tax Planning; L. Thomas Grogan, Jr. from MetLife Annuities on Retirement Income Planning; and Erin Thompson from the Social Security Administration on 2011 Social Security & Medicare Planning.

*For more information about this event, please contact Mary Ann Pontius at The Association Office, 419.381.1717, or email [mapattao@buckeye-express.com](mailto:mapattao@buckeye-express.com).*

As always, we welcome your comments and questions, and look forward to hearing from you.

## News Updates

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### Wedded Bliss

Under the new tax law, married couples have a \$10 million estate tax exclusion -- no planning necessary.

### Financial Planning



[Read Article](#)

### Are Taxes Certain?

Many affluent families pay nothing at all. Here's how they do it.

### Chicago Tribune



[Read Article](#)

### On the House

Thinking of donating property to a charitable cause? Here's what you need to know.

### The Philadelphia Enquirer



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### The Five Biggest Ways to Bungle a Trust

Tips to help you keep clear of any unwanted IRS attention.

### Barron's



[Read Article](#)

### Opportunities and Speed Bumps

New tax legislation could have a significant impact on estates.

### On Wall Street



[Read Article](#)

### What's in This Folder?

Agreements, deeds and leases are not core estate planning tools, but unless taken into account they could disrupt a plan.

### Financial Planning



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