



Toledo
Community
Foundation

"Giving" Advice

Inspiring and Connecting Thoughtful Giving

Toledo Community
Foundation

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VISIT OUR WEBSITE

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 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.

Happy New Year from Toledo Community Foundation!

Advisors and clients alike pay much attention to the details of wealth transfer—and rightfully so. But how does someone pass down values and philanthropic missions along with assets? This month we outline strategies for passing along personal values with the family estate. In our news section, we highlight how a new government program can help boost giving dollar for dollar and why there are suddenly so many philanthropic opportunities in Europe's most lauded institutions.

Event Note: TCF Staff to be in Florida

Keith Burwell, president, and Kris Theisen and Bridget Holt, philanthropic services officers, will be in Naples and Tampa, Florida, February 2-5, 2010 to meet with fund holders and friends of TCF. If you or your clients plan to be in the area and wish to meet our staff, please join us for a wine and cheese reception. Family and friends are welcome.

Tuesday, February 2, 2010 at 5:00 - 7:00 p.m.

Collier Athletic Club
710 Goodlette Road N.
Naples, Florida 34102

or Thursday, February 4, 2010 at 5:00 - 7:00 p.m.

University Club of Tampa
Verizon Building
One Tampa City Center
201 N. Franklin Street, Suite 3800
Tampa, FL 33602

If you plan on attending, please R.S.V.P. your interest by Monday, January 25 by calling 419.241.5049 or email Kris@toledocf.org.

The Foundation is here to help you. Please keep us in mind as you work with your clients to pay back the community with a philanthropic gesture. We can be your partner in meeting their needs.

As always, please feel free to share your thoughts with us.

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● FEATURE

Call It 'Instructive Philanthropy'

Many clients are looking for ways to pass down not just their assets, but also their values to future generations.

January 07, 2010

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NEWS UPDATES

Grappling With a Wealth of Guilt

Young heirs seek moral balance between inherited windfalls and social responsibilities.

November 20, 2009, The Washington Post

[>> Read Article](#)

Philanthropists and Government Partner for Good

New matching funds created by the federal government help boost giving dollar for dollar.

December 21, 2009, Dow Jones News Service

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More Estate Tax Returns Filed By the Rich

The congressional debate over whether to reinstitute the tax or let it expire has many people scrambling to cover their bases.

December 17, 2009, Dow Jones News Service

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A Culture of Giving

As Europe's arts institutions rely more on private funds, opportunities for donors are blossoming.

November 27, 2009, The Wall Street Journal

[>> Read Article](#)

Financial Therapy 101

A good investment advisor makes certain that clients don't make investment decisions based solely on emotions.

December 03, 2009, The Wall Street Journal

[>> Read Article](#)

Foreclosures: Proceed Carefully

Great foreclosure deals always make for good news stories. But much like any speculative purchase, there are caveats.

December 05, 2009, The New York Times

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Key Retirement Planning 'Dont's'

Don't miss this short list of investors' most common retirement planning mistakes.

December 06, 2009, The Wall Street Journal

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Where Are You Spending the Rest of Your Life?

Retiring abroad comes with many perks—and risks.

December 11, 2009, The New York Times

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Ten Ways to Boost Your Savings Balance

Cutting back on expenses and reviewing your tax profile are likely more effective strategies than putting money on a "hot" stock. Here are 10 steps you can take to save money now.

December 14, 2009, Forbes

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Five Ways to Rethink Your Retirement Plan

Now's a good time to incorporate all the new retirement research—and possibly some new products—into your long-term financial strategy.

December 03, 2009, Dow Jones News Service

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