



"Giving" Advice



**TOLEDO COMMUNITY
FOUNDATION**
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[TCF "GIVING" ADVICE
NEWSLETTER](#)

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

Welcome to the July/August edition of our foundation e-newsletter. In this issue, we look at the value of an unrestricted gift to respond to changing needs in the future. We also discuss the benefits to clients of a major philanthropic gift as part of an IPO or other liquidity event.

Earlier this week we sent a special edition of "Giving" Advice inviting you to a complimentary continuing education breakfast seminar with Charles W. Collier, senior philanthropic adviser at Harvard University. This seminar will be held on Tuesday, October 30, 2007 from 8:00 - 10:00 a. m. at the Inverness Club. Please RSVP your interest to Bridget Holt at 419.241.5049 x105 or email Bridget@toledocf.org.

We welcome your feedback and questions.

► *Features*

[The Enduring Value of an Unrestricted Gift](#)

Clients who wish to make a meaningful philanthropic gift to support changing local needs should consider an unrestricted gift to a community foundation.

[Taking Philanthropy Public](#)

When a client takes a company public or enjoys the benefits of a liquidity event, it is an excellent time to consider a major philanthropic gift. By donating to a community foundation, your client can provide significant support for local programs while maximizing the tax benefits.

► *News*

[10 Ways to Retain Clients](#)

TheStreet.com, July 2007

Client retention is one of the most important components of a successful business. It's less expensive to keep existing clients than to constantly troll for new ones.

[Helping Heirs Inherit The Earth \(Responsibly\)](#)

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.

Prism Insight Registered Rep. Online Exclusive, May 2007

A recent study reveals that few wealthy Americans have written incentives into an existing will or trust, even though most believe it's important that the next generation manage wealth responsibly. This discrepancy creates an opportunity for advisors.

[Making Good Assumptions Makes A Good Plan](#)

The CPA Technology Advisor, July 2007

As an accountant helping plan your clients' future tax liabilities, making as many assumptions as possible (and as correctly as possible) can help preserve the personal wealth they have built up throughout their lifetime and ensure distribution of it as they desire with the least amount of tax burden.

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