






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.

Writing a check is probably the most popular way to donate to charity. But you could do your clients a big favor by suggesting they instead give valuable illiquid assets, such as works of art. In this month's feature we consider the tax advantages to be gained from donating everything from a baseball team to toy soldiers. And in our news roundup, you'll find timely articles on philanthropic and wealth transfer matters from some of the world's best news sources.

Upcoming Event

Four local organizations - Toledo Area Partnership for Philanthropic Planning, Toledo Estate Planning Council, Financial Planning Association and Society of Financial Service Professionals - are partnering to host a fall continuing education symposium for professional advisors. Toledo Community Foundation will be a sponsor of this event.

Date: November 2, 2011

Location: The Pinnacle - Arrowhead Park, Maumee

Time: Continental Breakfast begins at 7:30 am; Seminar from 8:00 am - 2:45 pm

Speakers and their respective topics 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.

Watch for registration information in the next few months. For further information, please contact Mary Ann Pontius at The Association Office, 419.381.1717 or mapattao@buckeye-express.com or Bridget Holt at Toledo Community Foundation, 419.241.5049 or bridget@toledocf.org.

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

Feature

Giving More Than Cash

Highly appreciated nontraditional assets can help your clients fulfill their charitable goals.



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News Updates

The Season of Giving

The new \$5 million exemption opens the door to strategies ranging from simple to complex.

Financial Planning



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Major Changes to the Estate Tax Law

A recent revamping of the tax code has significant implications for wealth transfer plans.

Southeast Farm Press



[Read Article](#)

Making the Most of Intergenerational Bequests

\$8.4 trillion will pass from the boomer generation to the next. Here are some pointers for handling those inheritances.

Forbes



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Trusts Need Tax Tune-Ups

The recent tax compromises last till 2012, after which the outlook on estate planning gets ambiguous. Here are some options to help account for the unknown.

The Wall Street Journal



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Tax Tips for This Year and Next

Investors have important decisions to make about their short- and long-term plans. Are you prepared to offer the advice they need?

On Wall Street



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When Siblings Squabble Over an Inherited Home

With proper advance planning, you can help your clients reduce the potential for hurt feelings.

The Washington Post



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Two Cups of Tea?

The debacle surrounding Greg Mortenson is a powerful reminder to research charities before donating to them.

USA Today



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