



# "Giving" Advice



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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

Welcome to the March/April edition of our foundation e-newsletter. In this issue, we discuss the benefits of helping clients practice philanthropy as a family. We also look at some of the rules regarding gifts of restricted stock, options, and closely held interests.

Be sure to mark your calendar for an upcoming event for professional advisors. Lawrence Katzenstein, Esquire, of St. Louis, will be the featured speaker at a three hour continuing education seminar on **May 3, 2007**. The seminar will be held at the National City Bank Auditorium (downtown Toledo) from 9:00 a.m. until 12 Noon. Check-in and continental breakfast starts at 8:15 a.m. Please contact Bridget Brell Holt at the Foundation for more information and a reservation form: Phone 419.241.5049 or email [Bridget@toledocf.org](mailto:Bridget@toledocf.org).

We welcome your feedback and questions.

## ▸ *Features*

### [Giving as a Family](#)

Helping clients and their families fulfill their charitable goals will strengthen your relationship and extend your reach to the next generation. With a deep understanding of local needs, community foundations are an ideal resource for family giving.

### [Gifts of Restricted Stock, Options, and Closely Held Interests](#)

Clients who own illiquid securities such as closely held stock, restricted stock and stock options can use them to make meaningful gifts to charity. They can also generate significant tax deductions to offset income or capital gains. Community foundations are well-suited to help with gifts of illiquid securities.

## ▸ *News*

### [Bringing Up Baby: Advising the Rich on Their Kids](#)

*Prism Insight Registered Rep. Online Exclusive, February 2007*

Rich kids are a little bit smarter about money than you might think,

*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.

according to a recent survey. But they still have a long way to go in developing healthy earning, saving and investing habits. Financial advisors have a great opportunity to win client loyalty by helping out with the kids.

### [So Why Do the Really Rich Pile on Savings?](#)

*The International Herald Tribune*, March 2007

Though Warren Buffett is committed to giving away almost all of his fortune, most of the superrich are accumulating much more wealth than they plan to give it away. What motivates so many billionaires to hang on to their money?

### [Wealth Management: A Turf War to Win the Rich](#)

*Banking Wire*, February 2007

Over the next three years, the number of affluent individuals in North America is expected to bulge from 30 million to 37 million, fueled mostly by Baby Boomers whose retirement assets mature. It's little wonder that bankers, financial planners, private bankers and brokers are investing heavily in new wealth management platforms to meet their needs.

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