



"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

Welcome to the May/June edition of our foundation e-newsletter. In this issue, we examine ways for clients to use the sale of a business to help fulfill charitable intent. We also look at the inspiring story of Alex's Lemonade Stand, an example of how community foundations can serve people with highly creative charitable ideas.

The Toledo Community Foundation can help professional advisors match their clients' financial needs with their philanthropic impulse. We are just a phone call away.

You and your clients are invited to join us for an evening with **Richard Harwood on May 31st**. Please be our guest for cocktails and hors d'oeuvres and to meet Harwood, author of *Hope Unraveled: The People's Retreat and Our Way Back* at the Inverness Club from 5:15 - 7:30 p.m. Mr. Harwood will speak on Civic Duties and Leadership as it pertains to philanthropy, our country and community. It is sure to be an enlightening evening! See the Events column in this issue of "Giving" Advice for RSVP information.

We welcome your feedback and questions.

> *Features*

[Selling a Business, Helping Others](#)

When it's time to sell a business, community foundations allow clients to fulfill charitable intent and make substantial savings on their taxes. Advisors can assist clients by coming to the table with a package that includes a charitable legacy alongside a large spike in income.

[Fighting Cancer, One Lemonade at a Time](#)

A community foundation helped grow one child's idea of selling lemonade on her front lawn into an internationally acclaimed cancer fund-raising effort. The success of Alex's Lemonade Stand shows how community foundations are excellent resources for people with highly creative charitable ideas.

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.

UPCOMING EVENTS

You and your clients are invited to our regular **Third Thursday Luncheon Seminars** at 12 Noon at the Toledo Club:

- June 15: Medicaid Planning

- July 20: Area Office on Aging of Northwest Ohio

You and your clients are invited to be our guest for cocktails and hors d'oeuvres and to meet **Richard Harwood** on **Wednesday, May 31st**, at the Inverness Club from 5:15 - 7:30 p.m.

For additional information or to **RSVP** for any of these events, please contact Bridget Brell Holt, donor relations officer, at 419.241.5049 or email Bridget@toledocf.org.

» *News*

[The Final Reward](#)

Registered Rep., May 2006

At no other time does the work of a financial advisor have the potential to do so much good as when a client is diagnosed with a terminal illness. By first supporting the goals and desires of your client, you can become a partner in shaping a legacy.

[Passing on Your Values](#)

The Atlanta Journal-Constitution, May 2006

A growing number of people are writing ethical wills for their family and friends, hoping to pass on wisdom and inspiration from their life experiences. Unlike a traditional will and testament, ethical wills are all about values instead of assets.

[Your Fees Under the Regulator Microscope](#)

Registered Rep., April 2006

Now, more than ever, regulators are scrutinizing the fees financial advisors charge their retail clients. Between the SEC and ambitious attorneys general like New York's Eliot Spitzer, it is increasingly important for advisors to be able to justify their fees.

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