



# "Giving" Advice



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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

This month, we explore the benefits of working with community foundations. These organizations let hands-on philanthropists follow a project from start to finish without the worry of managing administrative details. And don't miss our sampling of news stories on giving and investments, including a look at charitable lead trusts, how to reach the wired wealthy, and the rise of anonymous giving.

**Special Event:** The Toledo Community Foundation is hosting two fall events featuring **Susan Price, vice president, National Center for Family Philanthropy, Washington, D.C.**

Ms. Price is the author of *The Giving Family: Raising Our Children to Help Others* (Council on Foundations, 2001, revised 2003), and is a frequent speaker to groups around the country on the subject of instilling philanthropic values in children.

Ms. Price will discuss ***Family and Legacy Giving: What Donors Expect from Their Advisors***, focusing on concerns families have about discussing philanthropy. She will include in her remarks the results of a NCFP interview study and offer suggestions on how the Advisor can help families, and share some common concerns in family philanthropy.

This Continuing Education Breakfast Seminar (approval pending for CLE, CPE, CFP and Ohio insurance credits) will be held on **Tuesday, October 7, 2008** at The Toledo Country Club from 8:00 – 10:00 a.m. We look forward to seeing many of you at this complimentary event.

A separate program will be offered on the evening of **Monday, October 6, 2008** at The Toledo Club for Foundation donors, donors' families and Foundation friends. Ms. Price will focus her remarks at this event on raising charitable children as the next generation of givers.

*Please contact Bridget Brell Holt, donor relations officer, at 419.241.5049 or [Bridget@toledocf.org](mailto:Bridget@toledocf.org) with questions or to RSVP.*

As always, we look forward to your feedback and questions.

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.

## ▸ *Features*

### [Funding Charitable Projects Locally](#)

Working with a community foundation offers donors hands-on opportunities to improve their cities and towns.

## ▸ *News*

### [Giving and Saving With CLTs](#)

*Registered Rep.*, April 2008

High-net-worth clients can use charitable lead trusts to pass more money to charities now and cherished family members later—and much less to Uncle Sam.

### [Donors: No Name Tags on Big Gifts](#)

*Los Angeles Times*, May 2008

Many philanthropists are choosing to remain anonymous, including the donor of a \$5 million gift to the Opera Santa Barbara—the largest gift in its 14-year history.

### [Survivorship Life Insurance Back in Favor](#)

*Registered Rep.*, April 2008

With estate taxes likely to rise in 2011, more affluent families see the benefits of second-to-die insurance plans.

### [Reaching the 'Wired Wealthy' Online Can Net Bigger Returns](#)

*Chicago Tribune (Illinois)*, April 2008

An "Internet communications gap" exists between many charities and their bigger donors, even as more higher-bracket people go online to contribute, a new report says. Also: grants, kudos, and nonprofit services for veterans.

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