



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.

In this month's feature, David Sweet of Rockefeller Philanthropy Advisors presents some winning strategies for families looking to develop or solidify their charitable commitments. In our news roundup, you'll also find timely articles on philanthropic, retirement, and estate matters from some of the world's best news sources.

Join Us! - The Foundation is one of the sponsors of a Continuing Education Seminar to be held on **Wednesday, December 8, 2010, from 8:15 a.m. to 11:45 a.m.** at the Hilton Garden Inn Toledo at Levis Commons. **"Beyond Basics: Estate Planning for Couples in a Second Marriage and Family Business Owners"** will feature Eric Manterfield, partner in the firm of Krieg/DeVault. Eric is a popular and dynamic speaker who effectively relates strategies and techniques for business succession and subsequent marriage planning. He will provide practical information to benefit your clients, as well as your skills and knowledge as an advisor. The focus of Eric's presentation is legal and financial planning issues, although he will be poised to address new or pending tax legislation if Congress addresses it! Registration fee of \$50 includes lunch. If you haven't RSVPd yet, please contact The Association Office at mapattao@buckeye-express.com or 419-381-1717 with your interest.

Make Giving Simple - By partnering with the Foundation, you can make it easier for your clients to give effectively while helping them receive tax benefits they may not realize on their own. We become your partner and a resource. The Foundation is simple. We encourage you to talk to your clients about creating a single fund at Toledo Community Foundation in their estate planning, which will allow them to designate donations to various and numerous charities. This can be done either through a permanent endowment or simply passing funds through to qualifying organizations or a combination of both. It's what we do best, and we offer your clients the power and flexibility of charitable giving without the paperwork, time and expense associated with other avenues of giving.

Please contact us at 419.241.5049 or email Kris@toledocf.org or Bridget@toledocf.org if we can be of assistance to you.

Holiday Hours - The Foundation will be open normal business hours through the end of the year with the exception of being closed on Thursday and Friday, November 25 and 26; at noon on Friday, Dec. 24th; and all day Monday, December 27th. Please keep us in mind as you deal with year-end giving plans with your clients, and call on us for assistance. As you know, to ensure that

year-end gifts qualify as a 2010 tax deduction, donations must be postmarked by December 31st.

Feature

Finding Common Ground

Walter Sweet of Rockefeller Philanthropy Advisors discusses the tricky (yet rewarding) process of helping families create charitable legacies.

[>>Read Article](#)

News Updates

Smart Year-End Tax Moves

Congress may be in the dark about tax code revisions, but that's no excuse for you not to prepare for certain change.
Forbes

[>>Read Article](#)

The Taxing Side of Art Collecting

Does your collection includes some hot properties? If so, you'll need to help your heirs avoid a nasty tax bite.

On Wall Street

[>>Read Article](#)

Hurry Up and Fund That Trust

Low interest rates and likely federal estate tax code changes make now an ideal time to park some assets in a GRAT.

The Wall Street Journal

[>>Read Article](#)

Leave the Children the House . . . Without a Hefty Price Tag

A few smart strategies can remove property from your estate without triggering a liability.

The New York Times

[>>Read Article](#)

The Family Way

Transferring a family business is a legal, financial, and emotional tangle. These strategies help clients do it right.

Financial Planning

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