



# "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

Welcome to the November edition of our Foundation e-newsletter.

In this issue, Keith Burwell, president of the Toledo Community Foundation, discusses how your clients with an interest in supporting local people in need during the holidays may find many interesting opportunities at their community foundation.

Also, this is your last reminder that the IRA charitable rollover passed by Congress allows anyone 70-1/2 or older to make an outright gift from their IRA of up to \$100,000 a year to a qualified charity without first claiming it as income and being taxed. It's a great tax savings opportunity for your clients. The Toledo Community Foundation has the expertise and the resources to help make the most of this short window of opportunity provided by this legislation - now through December 31, 2007. And, creating a fund through the Toledo Community Foundation enables your clients to turn this opportunity into long-term support of their favorite charities or causes. Be sure to read the related article in the News section below, "Giving Away an IRA."

We welcome your feedback and questions.

## ▸ *Features*

### [Addressing Holiday Needs](#)

Donors with an interest in supporting local people in need during the holidays may find many interesting opportunities at their community foundations.

## ▸ *News*

### [Giving Away an IRA](#)

*Registered Rep.*, November 2007

There's a rapidly closing window that may allow clients of a certain age to use required minimum distributions (and more) from IRAs to support a

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.

favorite cause.

### [Talking Charitable Giving With Clients](#)

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

Charitable giving is not just for the Bill Gates and Warren Buffets of the world. In fact, it could well be an important part of your clients' or potential clients' financial lives.

### [Demographic Trends Boost Demand, Pose Challenges](#)

*The Idaho Business Review (Boise, ID), November 2007*

An aging workforce presents opportunities and challenges for firms that help clients invest for retirement.

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