



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.

We may be living in troubling times, but they are a rare moment of opportunity to help through estate planning and charitable giving. The downside is that the extension expires next year. In this month's feature, we explore how the tax rules affect client giving goals and wealth transfer plans. And in our news roundup, you'll find timely articles on philanthropic, retirement and estate matters from some of the world's best news sources.

TCF News - Date to Remember:

September 23, 2011 - a free continuing education seminar hosted by Toledo Community Foundation: Family & Privately-Held Business Succession Planning Using Charitable Techniques. Presenter: Michael V. Bourland, Esq., Bourland, Wall & Wenzel, P.C. (Fort Worth, TX).

Details: The Toledo Club, Corinthian Room, 7:45 am - 11:10 am (breakfast included). Please join us for the seminar and consider staying for an informal lunch following the seminar for professional advisors and your clients.

Please contact Bridget Brell Holt for further details and to RSVP at 419.241.5049 or bridget@toledocf.org.

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. We offer your clients the power and flexibility of charitable giving without the paperwork, time and expense associated with other avenues of giving.

As always, we welcome your comments and questions, and look forward to hearing from you.

Feature

The Tax Law Opportunity

Donors have plenty of ways to take advantage of last year's tax law changes.



[Read Article](#)

News Updates

Charitable Giving Rises in U.S. for the First Time in Years

Wealthy investors give more appreciated assets and save more in taxes.

The Seattle Times



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How Volatility Eases Estate Planning

Wild market swings may be tough on the nerves, but they could be a boon for wealthy families looking to shelter assets from taxes while helping their children.

The Wall Street Journal



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Once-in-a-Lifetime Gifting Opportunities

Here's how to take advantage of the federal exclusion, with an eye toward state regulations and responsible recipients.

Reuters



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Conversation Starter

Four advisors share tips on how to get clients talking about estate planning.

Financial Planning



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Trusts Are on the Upswing, but Mind the Details

This is the best time in recent memory for passing wealth down to heirs. But it may not last.

The New York Times



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