



"Giving" Advice



**TOLEDO COMMUNITY
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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 transform their philanthropic

Welcome to the September edition of our e-newsletter. In this issue, we discuss how trusts can help your clients support the charities they love, the children they've raised, and the partners they may leave behind.

In our news section we look at the importance of donor privacy, consider the possibility that "fair" in estate planning might be all in the eye of the beholder, and look at how to protect older, wealthy clients from irresponsible caregivers and "friends."

The Foundation offers more news and articles of interest for professional advisors on our website. If you haven't visited our Resource Library, be sure to browse it for some interesting reading. The latest article added, *Reducing Guesswork*, speaks about the advantages to donating through community foundations and how the Baltimore Community Foundation assisted a financial advisor in accomplishing his client's goal. Randolph Brinton, a financial advisor and senior vice president of Ferris, Baker Watts Inc. in Baltimore, had a client who wanted to give 10 different charities \$5,000 a year each by selling some securities and other assets. It was a doable job, but a time-consuming one for both the advisor and the client. The solution was to give the lump sum to the Baltimore Community Foundation and let it sell the assets and dole out the money.

Visit our website and read more. You'll find this article in the Discussing Philanthropy with Your Clients section: http://www.toledocf.org/site/c.iqIWL4PIJtH/b.1430901/k.D077/Resource_Library_Topic_Areas.htm

UPCOMING EVENTS: If you haven't registered for our upcoming Continuing Education Breakfast Seminar featuring Susan Price, be sure to do so now. Susan Price, vice president, National Center for Family Philanthropy (NCFP), Washington, D.C., 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 complimentary breakfast seminar will be held on **Tuesday, October 7th**, at The Toledo Country Club on River Road, from 8-10 a.m. This seminar is approved for 1.5 hours of CLE, CPE, CFP and OH Insurance credits.

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.

A separate program will be offered on the evening of **Monday, October 6th**, 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 with questions or to RSVP.

We welcome your feedback and questions.

▸ *Features*

[Death and \(Less\) Taxes](#)

An estate planner who wants to create a more tax-efficient legacy should consider a trust as part of the solution.

▸ *News*

[The Invisible Donor](#)

Registered Rep., September 2008

Formal, public recognition of donors large and small has long been a no-cost way for charities to say "thank you" to those who provide financial support to a particular cause.

[Estate Planning and the Family Home](#)

The Capital (Annapolis, MD), August 2008

Two possible glitches could affect your best estate planning interests if you insist on keeping the title of your home in your own name.

[Protecting Wealthy Senior Clients—From Caregivers and 'Friends'](#)

Prism Insight Registered Rep. Online Exclusive, August 2008

Financial advisors should consider suggesting senior trusts to elderly clients, and maybe even to younger clients, as a form of insurance against later vulnerability to undue influence.

['But That's Not Fair, Dad!'](#)

Ward's Dealer Business, August 2008

Most parents don't want to appear to be playing favorites with their children. This often leads to estate distribution plans treating everyone equally, which can be extremely unfair.

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