



"Giving" Advice



**TOLEDO COMMUNITY
FOUNDATION**
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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 August edition of our e-newsletter. In this issue, we discuss how you can build a more tax-efficient estate plan with the help of community foundations. We also look at the benefits to be had from giving away your money now, how you can use leveraged gifting to better support cherished causes and family members, and how QTIP trusts can minimize tax penalties.

Upcoming Foundation Sponsored Events

Please mark your calendar to hear **Pamela Jones Davidson, J.D.** who will present a workshop on **October 2, 2008** from 1-4:30 p.m. on *What's Hot in Charitable Gift Planning*. Sponsored in part by the Toledo Community Foundation, this workshop is part of the Bowling Green State University Financial Planning Professionals Education Seminar series. Three credit hours of continuing education are pending for this free session.

To register for this seminar at Stone Ridge Golf Club in Bowling Green, contact Denise Freeman, BGSU gift planning secretary, at dfreema@bgsu.edu or 419.372.3878.

On **October 7, 2008**, professional advisors are invited to attend a workshop on *Family and Legacy Giving: What Donors Expect from their Advisors* from 8-10 a.m. at The Toledo Country Club. This is a complimentary continuing education seminar hosted by the Foundation and presented by **Susan Price**, vice president, National Center for Family Philanthropy in Washington, D.C. This seminar is approved for 1.5 hours of CLE, CPE, CFP and OH Insurance credits.

RSVP your interest for this event to Laura Sams at Toledo Community Foundation, Laura@toledocf.org or 419.241.5049.

We welcome your feedback and questions.

▶ *Features*

[Build a Tax-Efficient Estate Plan](#)

Care for loved ones, support a cause, and gain valuable tax benefits with

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.

the help of a community foundation.

[» News](#)

[CRUTS and CRATS](#)

Registered Rep., June 2008

CLTs might be an optimal solution but aren't for everyone. Specifically, they may not be the best idea for older clients who would like a nice income in return for their donations.

[Should You Consider a QTIP Trust in Your Estate Plan?](#)

Intelligencer Journal (Lancaster, Pennsylvania), June 2008

Dividing your assets with a QTIP trust can provide significant tax benefits.

[Want to Win the Estate Tax Game? Think Leveraged Gifts.](#)

Products Finishing, June 2008

Lifetime gifts to your family represent a major tax-planning strategy. Gifts are an easy way to move assets within the family unit, remove future income from your estate, and provide for future generations.

[Shift That Wealth Now](#)

Forbes, June 2008

Stock prices and interest rates are down and the estate tax is here to stay. Time to think about gifts and GRATs.

[Why Wait to Give Away Your Money?](#)

U.S. News & World Report, July 2008

Parents and grandparents with money to spare are no longer waiting until death to pass on their wealth. Instead, they're increasingly handing it over to their adult kids while they're still around to see how it's spent—and, in some cases, lend a hand.

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