



# "Giving" Advice



**TOLEDO COMMUNITY  
FOUNDATION**  
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[TCF "GIVING" ADVICE  
NEWSLETTER](#)  
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## 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 impulse to measurable

Though so-called megadonations get the headlines, the majority of philanthropy takes place on a more modest scale. This month we discuss how small donations, whether individually or collectively, can make a big difference in charitable pursuits. Also, in our news section we focus on how you can keep giving even in tough times, the benefits of including an estate plan in your will, and how donations to charitable causes can ease your tax burden.

### **Transferred Wealth Could Make Big Impact**

It is estimated that the current net worth of Lucas County residents is \$33.4 billion. In the next decade, \$6.42 billion is expected to be transferred from one generation to the next. Over the next 50 years, the estimated transfer of wealth in Lucas County alone is \$38.9 billion.

Imagine if the Foundation received just a small slice of that wealth to help our community. This is a historical opportunity to strengthen Lucas County.

A full report on Wealth Transfer in Ohio is available at [www.toledocf.org](http://www.toledocf.org). Click on the TCF Research Report heading, and look for Lucas County Transfer of Wealth.

Please let the Foundation help you with your client's transfer of wealth, ultimately to help generations to come. For more information please contact either of our Philanthropic Services Officers at 419.241.5049 or email Bridget Brell Holt at [Bridget@toledocf.org](mailto:Bridget@toledocf.org) or Kris Theisen at [Kris@toledocf.org](mailto:Kris@toledocf.org).

### **Please Note - Upcoming Events**

#### Dr. Morton Goldberg Lecture

Toledoan Rabbi Alan Mayor Sokobin will present a lecture titled "It Did Not End with Moses" on **Sunday, November 15** at 2 p.m. at the Franciscan Center of Lourdes College. His presentation will review the development of Jewish law through the centuries and how it is still applicable today. The lecture is free and open to the public, and will be followed with a reception.

Rabbi Sokobin's presentation is made possible by the Dr. Morton

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.

Goldberg Lecture Fund of the Toledo Community Foundation, which was established in 1975 to honor Dr. Goldberg, rabbi emeritus of Temple B'nai Israel.

### *Christopher R. Hoyt CE Seminar*

This is the last reminder to mark your calendar for 8:00 a.m. through lunch time on **Thursday, October 29** to hear Christopher R. Hoyt, Professor at the University of Missouri (Kansas City) School of Law. This continuing education seminar (for insurance, attorney, CPA, CFP and CFRE) to be held at the Hilton Garden Inn (Levis Commons), is co-sponsored by a number of local organizations. To register, send a check for \$50.00 made payable to: TAPGC. Mail to: Cindy Rimmelin; 25001 West River Road; Perrysburg, OH 43551. If you have any questions, please contact Bridget Brell Holt or Kris Theisen at the Foundation at 419.241.5049.

Please join us!

As always, please feel free to share your thoughts with us.

## *Features*

### Small Gifts, Big Results

"Megadonations" may get the publicity, but it's modest gifts that power the bulk of philanthropy. Community foundations are effective partners in making small gifts generate large benefits.

## *News*

### Someday, This Will All Be . . . Whose?

*Accounting Today*, September 2009

Careful planning of wills and trusts can keep a family business going.

### Ingenious Ways to Keep Giving

*On Wall Street*, September 2009

Strategies that help clients meet their philanthropic plans even in tough times.

### Charitable Gifts of Conservation Easements

*New York Law Journal*, August 2009

An overview of the tax rules, followed by a recent court case on the valuation of easements.

### Tips for Tax-Deductible Donations

*St. Paul Pioneer Press*, August 2009

Charitable giving didn't dry up with the recession, but it did become more selective.

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