FLEXIBLE GIVING STRATEGIES

Giving Now

Perhaps your client has a liquidity event and wants to use charitable giving to offset gains. Starting a charitable fund at the Community Foundation gets them a tax deduction now while allowing them to support specific causes or charities whenever they wish. Your client can name the fund and make grants during their lifetime. Then, they can pass the fund on to their children or use it to make grants to specific charities after they’re gone.

Giving Later

Perhaps your client is planning for the future. We make planned giving simple for both you and your client. You draft a few sentences in your client’s will or trust to make a future gift to the Community Foundation for Brevard; we work together on a fund agreement that captures your client’s charitable wishes. Once realized, the fund will keep your client’s giving spirit alive long after they’re gone.

Giving to Get Income

Many of your clients may benefit from donating a highly appreciated asset that allows them to receive income during their lifetime. Tools like charitable gift annuities and charitable remainder trusts offer tax relief, lifetime payments, and, ultimately, a permanently endowed legacy that fulfills their charitable wishes forever.

HELPING YOUR CLIENTS ACHIEVE THEIR CHARITABLE GOALS.

We think you will find us unlike any other organization you’ve ever met because our mission is helping people give: efficiently, effectively and meaningfully to their favorite causes and charities. Through us, your clients can get the same charitable tax deduction as a direct gift to charity, but with the personal legacy that comes with starting a charitable fund. And you get the benefit of helping your clients achieve their financial and charitable goals in a uniquely personal way.

HOW DO I START A CONVERSATION WITH MY CLIENT ABOUT CHARITABLE GIVING?

- Ask your client “What do you want to accomplish with your wealth?”
- Do they have a history of giving to multiple charities and/or local nonprofits?
- Are they creating or re-writing a will?
- Are they considering the creation of a private foundation, but concerned about cost, anonymity and administrative complexity?
- Do they have assets that will be subject to probate upon their death?
- Are they getting ready to sell a business or will they experience another significant tax event?
- Do they want to involve their children or grandchildren in philanthropy?

If the answer is “yes” to any of these questions, your client will benefit from knowing more about the Community Foundation. We are happy to work through you to introduce this opportunity.
YOUR CLIENTS HAVE A VARIETY OF BUSINESS, PERSONAL AND FINANCIAL NEEDS. WE OFFER SOLUTIONS.

By creating a fund at the Community Foundation, your client will be able to accomplish more with their gift than they might have thought possible, along with receiving expert charitable advice and personal attention – all from a local partner committed to the community.

There is no more positive reflection of the character of a community than the existence of a vibrant & growing Community Foundation supported & fostered by local people for local causes.

- Amanda Smith, Esq.

The Community Foundation makes my clients' giving simple & worry-free. They do all the work, including the due diligence. It's a strong organization that, like its donors, cares about the Space Coast.

- Michael Cerow, CPA

If your client is looking for greater impact, less paperwork, better tax advantages, and expert advice, the Community Foundation for Brevard is your partner. Contact us to learn more: