How to Deepen Your Client Relationships

COMMUNITY FOUNDATION OF BROWARD
For Good. For Ever.

The Value of Philanthropic Conversation

We are in the middle of the single largest transfer of wealth in history. In less than a decade $25 billion will be passed to the next generation right here in Broward. Charitable giving will account for $1 billion of the transfer. Your clients will rely on you for guidance to help them through this process.

More than 90 percent of HNW individuals want to talk with their advisor about philanthropy. Helping your clients with their philanthropy will deepen your client relationships and grow your business. At the Community Foundation of Broward, philanthropy is our business. We are always ready to serve as the charitable arm of your professional team.

- 450 charitable Funds
- $173 million in assets
- 30 years of experience
- $72 million in community grants
- Ranked in top 100 community foundations

Your Philanthropy Partner

The Community Foundation of Broward ensures your client's philanthropy is strategic, effective and efficient. How? By giving your client:

Strategic.

- A personalized philanthropic plan shaped by a fun and meaningful VALUES 360° consultation.
- A permanent Fund that bears their name and will carry on their legacy, forever.
- The simple joy of giving back without the burdens of administration.

Effective.

- A team of experts to research, evaluate and monitor their grants.
- Connections to other like-minded philanthropists at events and education sessions.
- Regular communications on the difference their Fund is making.

Efficient.

- As a public foundation, your client's gift to create a Fund at the Foundation earns them the maximum tax benefits allowed by law.
- Funds can be created with a wide variety of assets, including cash, publicly traded securities, closely held stock, interests in limited partnerships, real estate or tangible personal property.
- A professionally managed Fund with access to highly sophisticated large portfolio investment that complies with ever-changing legal and IRS regulations.

One Size Does Not Fit All

At Community Foundation of Broward we know powerful, effective and rewarding philanthropy occurs when the impact of your client's giving is driven by their unique values. The Foundation offers a variety of Funds to support your client's unique charitable goals during their lifetime or through their estate plans:

- Your clients want to start a private foundation during their lifetime. A **donor advised Fund** is a smarter choice. It acts just like a private foundation, only it provides an expert support team without the expense and administrative obligations.
- Your clients have an entrepreneurial spirit. Entrepreneurs are forward-thinking philanthropists who appreciate an **unrestricted Fund** because it has the flexibility to respond to the pressing needs of the time.
- Education, the arts or medical research. If your client is committed to a specific cause a **field of interest Fund** is creative and flexible, and reflective of your clients' passions.
- Your clients are volunteers at a nonprofit organization or they want to support a scholarship program at their alma maters. A **designated Fund** ensures predictable, annual income for the charities they love most.

Timing is Everything

Often your clients need time to consider their philanthropic legacy and the Foundation remains available to you for the long haul. However, if their need is immediate, the Foundation can create a Fund in a matter of hours. While any time is a good time to open a Fund, the best time is often when:

- **A financial event occurs and your client is about to receive new assets.**
- **It is tax-wise to make a gift before year-end.**
- **You update your client's will or trust.**
- **They are considering opening or terminating a private foundation.**

For suggested testamentary language – including options for clients who frequently change their minds, please visit our website at cfbroward.org/Resources-for-Advisors

5 Questions

to ask your clients:

1. Are you currently involved with charitable giving?
2. Do you want to pass on your tradition of giving to loved ones?
3. Do you feel a sense of obligation to any institutions, organizations or causes?
4. Would you like to include philanthropy in your financial or estate plan?
5. Would you like your values to be reflected in your charitable giving?

If your client answered "yes" to any of these questions we can help.

Our Promise to You

The Community Foundation of Broward delivers the flawless professional service you demand for your clients.

We invite you for a conversation to explore ways we can help you better serve your clients and this community.

Please contact:
Community Foundation of Broward,
Nancy Reierson, Vice President of Philanthropic Services,
at nreierson@cfbroward.org
or 954.761.9503

For more information visit:
cfbroward.org

Professional Advisors Council

The Professional Advisors Council of the Community Foundation of Broward is composed of professionals who work with the Community Foundation to fulfill their clients' philanthropic goals. Membership is by invitation and is exclusive to those who have successfully referred a client to the Foundation.

Frank T. Adams, Esq.
Katz Barron Squitero Faust

Louis C. Anderson, Esq.
Louis C. Anderson Law Office

Richard A. Berkowitz, JD, CPA
Berkowitz Pollack Brant
Advisors and Accountants

Jeffrey N. Blaze, CFP®
FDR Financial Group

Lesleen Bolt
Morgan Stanley Smith Barney

Judy B. Bonevac, Esq.
Judy Barringer Bonevac, P.A.

Francis B. Brogan, Jr., Esq.
Greenberg Traurig, LLP

Ralph M. Byer
Merrill Lynch

John Cartledge
UBS Financial Services, Inc.

Lowell J. Chick, CPA, MBA
Chick and Karo, CPA's, P.A.

Christina M. Cleveland, FA
Merrill Lynch

Alan B. Cohn, Esq.
Greenspoon Marder, P.A.

Richard G. Coker, Jr., Esq.
Coker & Feiner, P.A.

Joan K. Crain, TO
BNY Mellon Wealth Management

James B. Davis, Esq.
Gunster

Lawrence L. Davis, LLM, CPA
Law Office of Lawrence L. Davis, P.A.

David J. Diaz, CFP®
Merrill Lynch

James M. Dolan, CPA
James M. Dolan, P.A.

Frank B. Dolph III
Frank B. Dolph III & Associates

Mary Sue Donohue, Esq.
Law Offices of Mary Sue Donohue

Pamela A. Fau, TO
SunTrust Bank, South Florida, N.A.

Ralph L. Focaracci CPA
Ralph L. Focaracci, P.A.

John P. Friedrich Esq.
Friedrich & Friedrich, P.A.

Charles A. Goff, Esq.
Casoria & Goff, P.A.

Adam S. Goldberg, Esq.
Krause & Goldberg, P.A.

Deborah P. Goodall, Esq.
Goldman Felcoski & Stone P.A.

Henry Goode III, FA
Spartan Strategies Group

Katherine N. Guida, TO
Northern Trust Bank of Florida

Marie C. Hansen, TO
Northern Trust Bank of Florida

Marlon A. Hill, Esq.
Delancy HIll, P.A.

Douglas F. Hoffman, Esq.
Rudolf & Hoffman, P.A.

Kenneth M. Jones, Esq.
Moody, Jones & Montefusco, P.A.

Jennifer Jones, LLM, CFP
Nostro Jones Attorneys at Law

Robert B. Judd, Esq.
Hackleman, Olive and Judd, P.A.

Thomas O. Katz, Esq.
Katz Baskies LLC

Robert L. King, Esq.
Robert L. King Law Office

Robin J. King, Esq.
Edwards Wildman Palmer, LLP

Leonard Kinker, CPA (retired)

Tracey Kinker, CPA
Tracey J. Kinker CPA, P.A.

Curtis J. Kuramoto
Merrill Lynch

John Lacy, FA
Merrill Lynch

Stephen J. LaForte
BNY Mellon Wealth Management

Christine L. Lambertus, Esq.
Lambertus & Lambertus, P.A.

Jody Leslie, Esq.
Leslie & McLaughlin, LLP

Vladimira Libansky, Esq.
Robert L. King Law Office

Jack R. Loving, Esq.
Loving Scully Law Group, PLLC

David Lum CFP®
Merrill Lynch

Kristen M. Lynch, Esq.,
AEP, CISP, CTFA
Fowler White Burnett, PA

Anne B. MacLean, Esq.
MacLean and Ema

Mark R. Maller
TD Bank

Patricia Martinez
MetLife – New England Financial

Anne J. McPhee, Esq.
Snyder & Snyder, P.A

Donald B. Medalie, Esq.
Medalie & Medalie, P.A.

Greg Medalie, Esq.
Medalie & Medalie, P.A.

Kenneth R. Mikos, Esq.
Kenneth R. Mikos, P.A.

Cort A. Neimark, Esq.
Lubell & Rosen

Lucinda Golfin Ortigao
SunTrust Bank, South Florida, N.A.

Frederick F. Perry
U.S. Trust, Bank of America
Private Wealth Management

Peter A. Portley, Esq.
Portley and Sullivan

Raymond J. Powers
Powers & Disque, C.P.A., P.A.

Carlos J. Reyes, Esq.
Reyes Law Group, P.A.

Jennifer J. Robinson, Esq.
Northern Trust Bank of Florida

Charles D. Rubin, Esq.
Gutter Chaves Josepher Rubin
Forman Fleisher, P.A.

Gary L. Rudolf, Esq.
Rudolf & Hoffman, P.A.

Gregory J. Schaeffer
Morgan Stanley Smith Barney

Barry S. Schinder, Esq.
Barry S. Schinder, P.A.

Ilene S. Schnall J.D., LLM
Ilene S. Schnall, P.A.

David M. Scully Jr., Esq.
Loving Scully Law Group, PLLC

Jeffrey S. Selzer, Esq.
Selzer & Weiss, Attorneys at Law

Barbara A. Shore, Esq.
Barbara Ann Shore, P.A.

Jeffrey Shover
Morgan Stanley Smith Barney

William A. Snyder, Esq.
Snyder & Snyder, P.A.

William F. Sullivan, Esq.
Portley and Sullivan

Eric W. Sulzberger, Esq.
Law Offices of Sulzberger
& Sulzberger

Gene C. Sulzberger, J D, TEP, CFP®
PRS Investment Advisory

Donald R. Tescher, Esq.
Tescher & Spallina, P.A.

Benjamin A. Tobias,
CFP®, CPA/PFS, CIMA®, AIF®
Tobias Financial Advisors

John Torregrosa
UBS Financial Services, Inc.

Charles L. Verner
UBS Financial Services, Inc.

Debra Vogel
Wells Fargo

Jo Ann Voight, CPA
Jo Ann Head Voight, PA, CPA

Patricia R. Voss, Esq.
Patricia R. Voss, P.A.

John M. Walsh, JD
Fusion Analytics Investment
Partners, LLC

Misty Weinger, CPA/CFF, CVA
Kofsky, Hartman & Weinger, PA

Steven H. Woods, CPA
Keefe, McCullough & Co., LLP

Ghenete Wright Muir, Esq.

Charles D. Zalakar, CTFA
Northern Trust Bank of Florida, NA

Kurt D. Zimmerman, Esq.
Zimmerman & Associates, P.A.

As of June 30th, 2014.

COMMUNITY FOUNDATION OF BROWARD
For Good. For Ever.