

Give Now. Decide Later.

Solve your client's year-end dilemmas by recommending a donor advised fund.



Much charitable giving is done at the end of the year as people begin to realize they need to lower their taxes, avoid capital gains, or make the mandatory distribution from their private foundation. Establishing a donor advised fund at Community Foundations of the Hudson Valley is an easy and efficient solution for your clients who are facing one or more of these common year-end problems.

Your client just sold a business and is facing a significant increase in taxes. A charitable deduction is appealing, but she doesn't know what to support.

Solution: Recommend that your client establish a donor advised fund through Community Foundations of the Hudson Valley. The establishing gift will result in an immediate tax deduction, and then she can take her time deciding where to make the grant distributions.

Your client has owned highly appreciated stock for more than a year. He wants to give back to the community as well as teach his children about the importance of charitable giving.

Solution: Suggest that your client create a donor advised fund at Community Foundations of the Hudson Valley with a gift of appreciated stock. Your client will receive a tax deduction for the fair market value of the stock in addition to avoiding the capital gains taxes on its sale. Your client and his children can then work together to give the money away to causes that are important to them.

Your client's family foundation must distribute 5% in grants before the end of the year, but the family is having trouble deciding and time is running out.

Solution: Because Community Foundations of the Hudson Valley is a public charity, the family's foundation can make a single lump-sum distribution into a donor advised fund to fulfill the minimum distribution requirement. Then, at their convenience the family can discuss their grant-making priorities.

Some advisors are reluctant to talk about charitable giving with their clients

and may be concerned about appearing to make a value judgment, especially if the client has not expressed charitable intentions. However, by not broaching the subject, a significant opportunity may be lost for your clients and the community. In fact, many individuals expect their professional advisors to bring up the subject if appropriate. For a list of suggestions on how to start a conversation about giving with your client, please give us a call.

Community Foundations of the Hudson Valley has earned the trust of many professional advisors throughout Dutchess, Ulster and Putnam Counties. We work to enhance the service clients seek from you and your firm — always respecting and working within the relationship you have with your clients. We can assist from behind the scenes or in a more visible role.

There's so much more we'd like you to know. Community Foundations of the Hudson Valley is a convenient, professional resource that helps you do more for your clients. We welcome the opportunity to work with you to fulfill your clients' unique charitable objectives.

To begin the simple process of setting up a donor advised fund, or for other information, contact:

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