

*Is giving through
the Community
Foundation right
for your clients?*



Seven questions for estate and financial advisors.

1. Do I have clients who care deeply about their local community?
2. Do they give to more than one charitable cause?
3. Are they interested in creating a personal or family legacy in their community?
4. Are they considering the creation of a private foundation, but are concerned about cost and administrative complexity?
5. Would they like to stay personally involved in the use of their gift dollars?
6. Do they want to receive maximum tax benefits for their charitable contributions under federal law?
7. Do they place a priority on sound financial management of their contributions?

If you answered yes to any of these questions, your clients would benefit from knowing more about their community foundation. We'd be happy to help you make an introduction.

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*Your first resource for
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Affiliates:

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of Dutchess County

Community Foundation
of Ulster County

Community Foundation
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**COMMUNITY
FOUNDATIONS**
OF THE HUDSON VALLEY

SERVING DUTCHESS, ULSTER & PUTNAM COUNTIES