

Professional Advisors & Philanthropy

How a partnership with the Community Foundation can create change for good.



Elevate your client's philanthropy

Since 1984, the Community Foundation for Southeast Michigan has helped thousands of individuals in making lasting, positive impacts in the region. With a profound understanding of community needs and local organizations, we serve as the ideal "one-stop-shop" for your clients' charitable planning.

We offer a wide variety of philanthropic planning resources specifically designed for professional advisors. We are here to answer any questions you may have; not just about the Community Foundation, but about any issue involving philanthropy.

Expertise and relationships to make change happen

The Community Foundation has the research and relationships to know the current needs of southeast Michigan and the expertise in giving strategies to meet those needs in partnership with professional advisors and their clients.

We have been a trusted resource for professional advisors and their charitable clients for decades.

Collaboration for impact

We are available to discuss planning ideas and to refer you to resources that can help you get the best solution for your clients' needs.

We are here to offer support and solutions that help professional advisors provide sterling service to their clients, linking those clients to effective charitable options.

We collaborate with you and your colleagues to raise awareness of charitable giving, provide technical assistance with planned gifts, analyze gift transactions, and share our extensive knowledge of the region and the people we serve.

Starting the charitable giving conversation with clients

Professional advisors often seek our guidance on initiating discussions about charitable giving with their clients.

We recommend getting the conversation started with some questions such as:

- Do you support any charitable organizations annually?
- Would you like to include any of these organizations in your financial or estate plan?
- If there were a way to redirect dollars from taxes to charity, would you be interested in exploring the options?
- Do you volunteer anywhere?

Follow-up questions may include:

- What are the issues, causes, and charities that you feel passionate about? Why?
- Which of your past charitable gifts have brought you the most satisfaction? The least? Why?
- What level of recognition and visibility interests you?
- To what extent would you like to involve your family in your charitable giving?
- How much of your wealth do you intend to leave to your children and grandchildren? If there is surplus, would you consider allocating it for charitable purposes?
- Would you prefer to make charitable contributions during your lifetime or through your estate after your death?
- Would you like a charitable giving solution that benefits you and your family, as well as a charity or cause you believe in?



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Resources for advisors

Philanthropy presentations for your firm

The Community Foundation can enhance your firm's professional development with a customized presentation that delves into effective philanthropic strategies for your clients.

Curated content for financial advisors

Stay up to date with the latest in legislation and trends in philanthropy with content from experts in the field.

Variety of Gift Options

Whether it's a one-time donation or contributions over the course of several years, we accept a wide variety of assets, including:

- Cash, check, wire or online donation
- Publicly traded securities
- Mutual Fund Shares
- Closely held business interests
- Real estate
- Intellectual Property
- Fully paid life insurance policies
- Retirement plan assets