

Starting the Conversation

Opportunities to bring up the subject of charitable giving with your clients:

- They want to leave a charitable legacy for future generations.
- They have already expressed an interest in charitable giving.
- They want to pass on their values to their children by engaging them in making a difference.
- They are concerned about how much to leave to children vs. to favorite charities.
- They anticipate a financial windfall and want to mitigate their tax burden.
- They do not need IRA assets to maintain their lifestyle and don't want to pay taxes on distributions.
- You see an opportunity to help a client save taxes by making a charitable donation.
- Their private foundation has become too demanding and expensive.
- They are new to the community and want to find ways to become involved in local issues and organizations.
- They want to give anonymously.