



# PROFESSIONAL ADVISORS

**We are your partner in philanthropy.**

**When you connect your clients with Gulf Coast Community Foundation for philanthropic guidance and support, it's a good thing—for your clients, your community, and your business.** Partnering with Gulf Coast is like gaining your own philanthropic back office. We even encourage financial advisors to continue managing the assets in their clients' charitable funds, during the donors' lifetime and beyond.

Our Philanthropy Team can assist you in developing customized plans that meet your clients' financial and charitable goals, all while providing the same level of service they expect from you. From selecting the best assets to use for their giving to identifying charities and projects that best match their unique interests, we are here to help you help your clients.

## An Advisor Story

A local financial advisor works with a whip-smart couple who always ask good questions. When they wanted to take their charitable giving to the next level, it was no different. How can we go from writing a lot of checks every year to making a more systemic difference? Who can show us charities doing the best work in areas we care about? How do we meet others who like to support the causes we do? Their advisor was no philanthropy expert, but his answer to all of these was easy: Let's talk to Gulf Coast Community Foundation...

We met with all three of them to customize a philanthropic plan that complements the couple's financial plan. First, we set up their new donor advised fund, whose assets their advisor continues to manage. Then we discussed their interests and introduced them to several charities they've since come to love. We even plugged them into events and volunteer opportunities where they met other donors—a few of whom are now their closest friends!

## Any of these sound like your clients?

- They write many checks to different charities and would benefit from consolidating their giving.
- They want to get their family involved in their philanthropy.
- They are creating or updating their estate plans and want to provide for their favorite causes.
- They have appreciated assets like stock or real estate that they would like to donate.
- They have the means and interest for charitable planning, but you aren't sure how to start the conversation.

**If so, then we should talk!**

# Why Partner with **Gulf Coast** Community Foundation?

**World-class service.** We treat your clients with the same level of care that you do.

**Expert insight.** We help our donors (and their advisors) navigate their philanthropy like pros.

**Local knowledge.** We understand the most pressing issues in our region and the best nonprofits working to address them.

**Flexible giving.** We can facilitate grants to causes in your client's backyard or across the country.

**Tax advantages.** We help donors earn the full range of tax benefits available for their generosity.

**Ease and convenience.** We can streamline your clients' giving to reduce paperwork, increase efficiency, and maximize the joy of giving.

**True partnership.** We always coordinate charitable relationships through you. In fact, we encourage advisors to continue managing assets in their clients' charitable funds even after a donor has passed.



## RESOURCES WE OFFER OUR PROFESSIONAL ADVISOR PARTNERS

1 Custom gift illustrations

2 Help in structuring gifts of complex assets

3 Expert knowledge of local charities and issues

4 Facilitation of family philanthropy planning

5 Continuing education opportunities

6 Office presentations and training for you and your team on how to help philanthropic clients

### About Gulf Coast Community Foundation

**Together with our donors, we transform our region through bold and proactive philanthropy.** Gulf Coast is one of the fastest-growing community foundations in the country, with over 1,000 families, individuals, organizations, and businesses that have established funds here. The foundation was created in 1995 through the sale of the Venice Hospital. Since then, together with our donors, we have invested over \$400 million to improve health and human services, education, arts and culture, the environment, and civic and economic development.

Learn more at [GulfCoastCF.org](http://GulfCoastCF.org).

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**COMMUNITY FOUNDATION**

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