



Smart Money

Community Foundation News for Advisors

A PUBLICATION OF THE CENTRAL NEW YORK COMMUNITY FOUNDATION



Winter 2018

Year-End Giving Tips

Earlier is better. Beat the year-end rush by sending gifts early. Also, more complex gifts, such as an IRA distribution or a gift of stock, may take longer to process, so please allow enough time.

Notify us when transferring stock. It is important to contact us when donating securities so that we may credit the gift appropriately. Also, please disclose the client's name when transferring the shares so we can identify them easily.

Use our online resources. Using our website, cnycf.org, donor-advised fundholders can make grant suggestions, replenish a fund, access our stock transfer form, and much more.

Dates to Know: Gifts credited for 2018 tax returns must be delivered to the Community Foundation by 4:30 p.m. on December 31, postmarked on or before December 31, or given online by 11:59 p.m. on December 31.



CNY Vitals: Making it easier to make a difference by *Monica Merante*

Monica Merante is the Senior Director of Philanthropic Services at the Central New York Community Foundation. She serves as the primary contact for Community Foundation donors, focusing on donor stewardship, outreach and engagement. In the article below, Monica previews how our new CNY Vitals website can prove a vital tool for advisors and their charitable clients.

Professional advisors play an important role in providing opportunities for their clients to achieve their charitable objectives. Most advisors agree that sparking dialogue about charitable giving is a crucial part of their practice, as it can be good for them, good for their clients and good for the broader community.

But asking the basic questions is often not enough. Recent trends in charitable giving point to a growing desire for curated giving options and opportunities to connect to measurable impact. Today's donors are savvy, smart and collaborative. They want to know that their support is effecting real change in their core areas of interest.

For example, how do you help your clients choose which causes to support and decide which avenues of giving will have the greatest impact? Some of your clients rely on facts and figures when directing charitable dollars. Others are compelled by stories of those in need. Still others are prompted by trusted advisors or friends. CNYVitals.org is a new website that delivers all three of these influencers in one easy-to-use resource, and it may just change how you and your clients make decisions about giving.

CNY Vitals aggregates and monitors local information that tells the story of Central New York. It is a project of the Community Foundation, but the data contained in the site draws from a variety of sources, including the US Census Bureau American Community Survey, the US Department of Labor, the Syracuse City School District and the New York State Education Department Report Card Database. Data that feed into the charts and graphs on CNY Vitals are regularly refreshed, giving you and your clients an accurate and relevant picture of their charitable impact.

The site is divided into six sections representing areas of need: Poverty, Education, Health, Housing, People and Economy & Arts. The data on these topics can be filtered by county and by city. Additionally, subsections feature information beyond the numbers:

- Introduction (an overview of the topic)
- Let's Break It Down (what the data tells us)
- Why Does It Matter? (how this issue impacts our broader community)
- A Local Story (a real-life example to illustrate the cause)
- What You Can Do (how to volunteer, donate and take action)

Clients who are keen on statistics can find them for each of the five counties in the Community Foundation's service area, and drill down by city and census tract.

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Contact Us

Our development team is available to assist you with the information and tools that help your clients achieve their charitable goals.

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Those inspired by the stories can connect the reported data to real people and their everyday lives. Just like the data sources, these narratives will be updated over time.

The call to action presented within each of the six highlighted areas is the result of the Community Foundation's knowledge of community resources, and our mission to make it as easy as possible for people to give, engage and advocate.

The Community Foundation is committed to helping people who care about CNY make informed decisions about charitable giving through data-driven philanthropy. We encourage you to explore CNYVitals.org and share the website with your clients to help guide their research and charitable decision-making. Throughout the year let us know how you and your clients are using the data so we can continue to refine this valuable community resource. Visit CNYVitals.org to learn more.

We are stronger when we give – and plan – together. The Community Foundation aims to be your partner in philanthropic giving – helping to simplify decisions and provide actionable data and insight into the influence your clients' charitable giving is having on our community. When we work together we can help them achieve their financial.

To learn more about charitable giving and community indicators at the Community Foundation, contact Tom Griffith, Vice President, Development at tgriffith@cnycf.org.