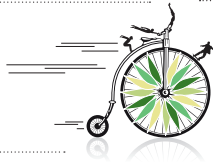


## : Professional Advisors

### CENTRAL NEW YORK COMMUNITY FOUNDATION

The Community Foundation recognizes the key role that you, as your clients' professional advisor and confidant, play in structuring a plan to address the needs and desires of clients with charitable interest. We work hard to make the charitable giving process easy and rewarding for all involved. To do that, we have dedicated ourselves to meeting your needs, ensuring that you have the technical information and tools at your fingertips to help your clients achieve their charitable goals.



### What can the Community Foundation do for you?

1. The Community Foundation provides an extremely flexible, accountable, dynamic charitable platform for long-term giving. Donors can create funds for multiple charitable beneficiaries or allow the Foundation to direct the funds to charitable organizations that can most effectively achieve the donor's goals. Also, the Community Foundation will steward the donor's intent and act as a hedge against nonprofit uncertainty.
2. The Community Foundation can create funds around a specific area of interest – for example, education, arts, or the environment. This fund can serve as a catalyst to bring other donors in the community to the table with similar interests, leveraging your client's contributions.
3. The Community Foundation can work with you and your client to identify the most effective type of life income gift to meet their needs and to maximize the benefits of those gifts through the use of the most effective assets and distribution rate.
4. The Community Foundation can serve as trustee of split interest vehicles like charitable remainder trusts or can arrange for third party trust administration if the donor prefers to self-trustee.
5. The Community Foundation can prepare charitable deduction calculations for your clients.
6. The Community Foundation accepts donations of complex, non-cash assets including real estate, closely held stock, art, collections and life insurance.
7. The Community Foundation can work with your clients who want to create a platform for family philanthropy.



CENTRAL NEW YORK  
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FOUNDATION, INC.

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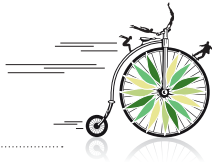
## : Professional Advisors

### CENTRAL NEW YORK COMMUNITY FOUNDATION

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Most of your clients may not know how to achieve their charitable goals or what they can accomplish through effective charitable planning. Some may not even know to raise the issue unless their advisor first presents the topic for conversation. Discussing philanthropy with your clients can be good for your clients and good for your business.

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### What can you do to support the Community Foundation?

1. Ask your clients about their charitable goals in the financial and estate planning process. This will increase charitable giving across the community. Begin with these three questions:
  - Do you have charities that you support on an annual basis?
  - Do you want to include any of these charities in your financial or estate plans?
  - If I could show you how to shift tax dollars to charitable dollars in your planning, would you be interested in exploring that?
2. Involve us during the planning process if you are creating a perpetual charitable gift through the Community Foundation. We will be happy to brainstorm with you about how that gift might be structured to best achieve your client's charitable goals.
3. Help educate your clients and the community about the unique role of the Community Foundation in building a permanent pool of resources for the community.
4. Serve as our ambassadors and advocates in the community. Encourage your friends, colleagues, or clients to call us or visit our website at [www.cnycf.org](http://www.cnycf.org) if they have questions, concerns, or see opportunities.
5. If you have questions or would like to discuss a specific situation for a particular client, please feel free to contact Tom Griffith, Director of Gift Planning, at **315-883-5544** or [tgriffith@cnycf.org](mailto:tgriffith@cnycf.org).



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