



Financial Advisor Program

Maximizing Charitable Opportunities

Truman Heartland Community Foundation (THCF) is a valuable resource to both professional advisors and their clients in maximizing philanthropic opportunities. Now, THCF is making it easier than ever for **financial professionals to help clients establish charitable funds.**

Participating in our Financial Advisor Program creates a unique advantage to you and your clients. **You can continue to manage your clients' assets AND meet your clients' tax and charitable goals!**

In addition, you will be connecting your clients with a highly-respected leader in philanthropy. THCF is recognized for its ability to handle complex charitable gifts and for its knowledge of local and regional charitable opportunities.

Benefits

The Financial Advisor Program is a win-win-win for everyone involved!

Financial Advisors are able to:

- **Retain their clients' charitable assets** at their financial institutions and continue managing charitable giving vehicles.
- **Convert assets of varying classes** (such as real estate, businesses, closely-held stock, etc.) into charitable dollars for the advisor to manage.
- **Offer clients value-added** charitable giving services through our Community Foundation partnership.

Partnering with the Community Foundation creates unique advantages for the financial advisor and his/her clients. Advisors are able to successfully meet their clients' tax and charitable goals while continuing to manage assets.

Connecting the Best Clients

Clients who qualify may be:

- Planning to **sell a family business** or transfer it to their heirs
- Concerned about assets with **high capital gains tax potential**
- Transitioning from work to retirement
- Beginning an **estate planning process**
- Wishing to **create a stream of income** for themselves or their heirs that will also benefit their favorite charities
- Needing a **current charitable deduction** with the flexibility to benefit their charities over the upcoming years
- Desiring to give something back to their community
- Wanting to create an endowment to **support their charitable interests for future generations**

Financial Advisors participating in this program must adhere to the Truman Heartland Community Foundations (THCF) professional standards and investment policy. Statements are reconciled monthly between THCF and financial advisors.