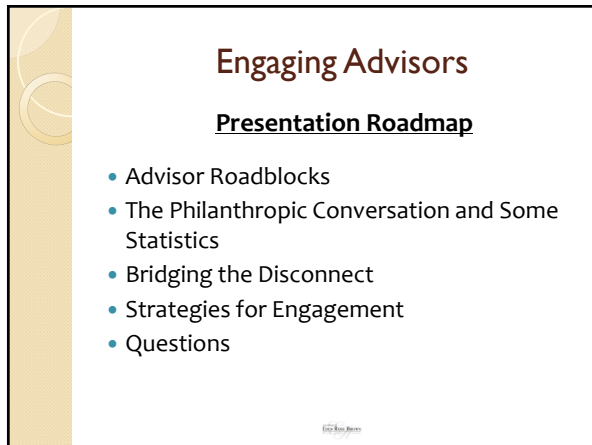
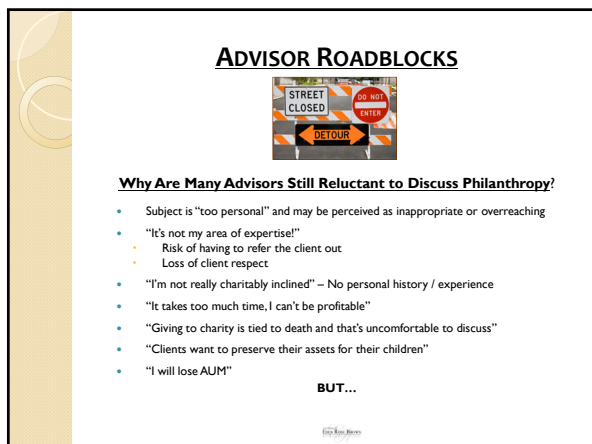




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78% of advisors agree that discussing philanthropy with clients is good for their business

- Deepens the client relationship
 - Go beyond tax considerations and include life goals, values and passions earns client's trust and loyalty
- Demonstrates greater interest in client's goals and aspirations
- Shows advisor is more interested in client than just their money
- Differentiates them from other advisors
 - 40% of clients are more likely to choose an advisor knowledgeable in philanthropy
- Brings in new business:
 - New family members / Engages the next generation
 - New products (life insurance, charitable trusts, etc)
 - Improves trust resulting in more AUM

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An Advisor's Impact on Client Giving is Undisputed

- 55% of Donors report advisors to be a valuable source of information – second only to spouses and partners at 84%.
 - Other family members: 48%
 - Friends: 37%
 - Non-profits: 33%

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- 91% (88%) of Advisors believe philanthropic discussions are "important" to have with clients
 - 52% (46%) believe they're "very important"
- 94% (89%) of Advisors discuss philanthropy with their clients to "some degree"
- 80% (71%) make it their regular practice to ask clients about their interest in charitable giving
- 66% discuss philanthropy as a way to involve future generations
- 54% will revisit the subject even if their clients initially appear disinterested
- 91% (!) encourage their clients to give to charity
 - and 41% do so regardless of the client's asset level

So what's the disconnect?

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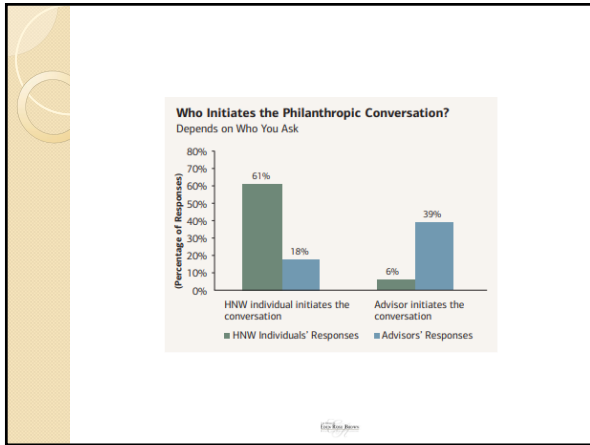
The Philanthropic Conversation

- 60% (47%) of individuals feel that their advisors are good at discussing charitable and personal goals, but just 41% are fully satisfied with their philanthropic conversations
- 71% of advisors raise philanthropy from a technical perspective (ie, focusing on taxes or wealth structuring) - only 35% center on charitable goals, values interests, or passions
- Among those clients discussing philanthropy with their advisors:
 - Only 6% of advisors initiated the conversation (!)
 - Clients want advisors to start the conversation at their first meeting (29%) or within the first few meetings (29%)
 - 73% believe those advisor discussions are important
 - Yet only 25% of advisors were deemed "very capable" by their clients on advising on local and national non-profits. Only 16% were deemed so for advising on international organizations.

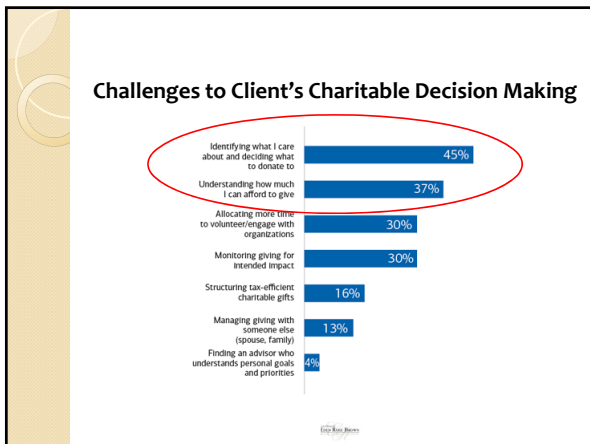
There is Room for Improvement!

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The Philanthropic Conversation

Help Your Advisors Bridge the Disconnect

Two Focus Areas when helping your advisors engage their clients in a deeper conversation on charitable giving: **Who to Talk To** and **What to Ask**

I. Who to Talk To:

- 21st Century donors are more diverse and varied and include:
 - Couples or individuals without children
 - Never-married adults
 - Divorced or Widowed clients
 - Women (often live longer and often more charitably inclined)
 - Parents with very successful children
 - Parents who want to limit the amount that they leave to children for various reasons
 - Clients who are already involved with charities or community causes
 - Younger entrepreneurs (often more philanthropic than inheritors)
 - Young families who want their children involved in charitable good
 - Clients who may sell/recently sold a business (liquidity event)

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Help Your Advisors Bridge the Disconnect

II. What to Ask:

- Advisors can explain to their clients that a conversation concerning their charitable interests will allow the advisor to give them the best professional advice possible.
- Teach them how to start the conversation:
 - "Are you currently involved with any non-profit organizations? How? As a donor, volunteer, board member?"
 - "Do you typically support the same charities each year or do you vary your support from year to year?"
 - "How do you decide which charities you support?"
 - "Who else helps you decide which charities to support? Children? Other advisors?"
 - "Do you give the same amount each year? Upon what does the gift amount depend?"
 - "Which donations have you made that have provided the greatest satisfaction or regret? Why?"
 - "How would you want to provide for your community?"
 - "Would you prefer to give anonymously or receive recognition?"
 - "What types of assets have you used when you have donated in the past? Cash, checks, appreciated stock, other non-cash assets?"
 - "Do you have any charitable vehicles in place such as a private foundation charitable trust or donor advised fund? "Any desire to change?" "Any issues with those you have in place?"
 - "Do you want to donate during your lifetime, at death, or for many years after your death?"

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Help Your Advisors Bridge the Disconnect

II. What to Ask:

- Some clients have never been philanthropic, but due to a liquidity event, retirement or some other impact or influence, they now have the time, interest or wealth to begin their philanthropic journey.
 - Advisors can ask similar versions of the prior questions:
 - Is there anything you want to do to honor people, organizations or institutions that have been important to you?
 - Are there certain geographic areas that have been important to you, your family or your business?
 - Would you be interested in supporting some of the causes and charities that people you admire support?
- When philanthropy is brought up this way, in the context of exploring a client's goals and values, it's less threatening to both the client and the advisor, and a deeper conversation can begin

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Help Your Advisors Bridge the Disconnect

Assess the Client's Personal Triggers and Goals

- Help the Advisor Learn What Drives Their Client
 - Avoiding Affluenza?
 - Making a Difference?
 - Minimizing Taxes?
 - Instilling Values?
 - Leaving a Family Legacy?
 - Faith and God?

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The Seven Faces of Philanthropy

- **Communitarian** (26%) – Doing good makes sense.
- **Devout** (21%) – Doing good is God's will, sense of purpose and mission in life.
- **Investor** (15%) – Doing good is good business.
- **Socialite** (11%) – Doing good is fun!
- **Repayer** (10%) – Doing good in return.
- **Altruist** (9%) – Doing good feels right.
- **Dynast** (8%) – Doing good is a family tradition.

(The Seven Faces of Philanthropy, Russ Prince and Karen File, 1994)

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The Philanthropic Conversation

Help Your Advisors Bridge the Disconnect

Include Philanthropic References Early and Often

- Add Space for Philanthropic Goals/Favorite Causes on Advisor's Client PIF / Initial Call Intake Sheet
 - Provides sense of client's level of philanthropic intent
 - Provides a Jumping off point for discussion

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Are there any persons (other than minor children) partially or wholly dependent upon you or your spouse for support now or possibly in the future? No

Do you, your spouse or children have any special needs or concerns? We don't want a long term care plan for our 17 year old daughter because we don't see the need for it. We are in the early stages of her life. We also don't want to have a long term care plan for her because we don't see the need for it. We don't want to have a long term care plan for her because we don't see the need for it.

Are you or your spouse likely to receive any inheritance in the future? Yes No

Do you have any particular areas of charitable interest? Yes No

Methodist Church of Roseburg, Oregon

What are your primary goals in estate planning? (Use extra page if necessary)

1. Protect the spouse & children
2. Provide for the children's education
3. Provide for the children's living expenses
4. Provide for the children's health care

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PART III. SPECIAL CONSIDERATIONS

Are there any especially important (or unusual) estate planning objectives (or problems) for you?

Are there any persons (other than minor children) partially or wholly dependent upon you for support now or possibly in the future?

Do you or your children have any special needs or concerns?

Are you likely to receive any inheritance in the future?

Do you have any particular areas of charitable interest?

What are your primary goals in estate planning? (Use extra page if necessary)

1. Protect the spouse & children
2. Provide for the children's education
3. Provide for the children's living expenses
4. Provide for the children's health care

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PART III. SPECIAL CONSIDERATIONS

Are there any especially important (or unusual) estate planning objectives (or problems) for you or your spouse?

Are there any persons (other than minor children) partially or wholly dependent upon you or your spouse for support now or possibly in the future?

Do you, your spouse or children have any special needs or concerns?

Are you or your spouse likely to receive any inheritance in the future?

Do you have any particular areas of charitable interest?

What are your primary goals in estate planning? (Use extra page if necessary)

1. Provide for the spouse
2. Provide for the children's education
3. Provide for the children's living expenses
4. Provide for the children's health care

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PART III. SPECIAL CONSIDERATIONS

Are there any especially important (or unusual) estate planning objectives (or problems) for you?
ACCOUNTANT HAS INDICATED THERE ARE ARE DETERMINE TO SET UP TRUST TO AVOID ESTATE TAX (TRUST), SHOULD ALSO LIKE TO MAKE IF ANYTHING SHOULD BE UPDATED NOW THAT I RESIDE IN OREGON.

Are there any persons (other than minor children) partially or wholly dependent upon you for support now or possibly in the future? *NO*

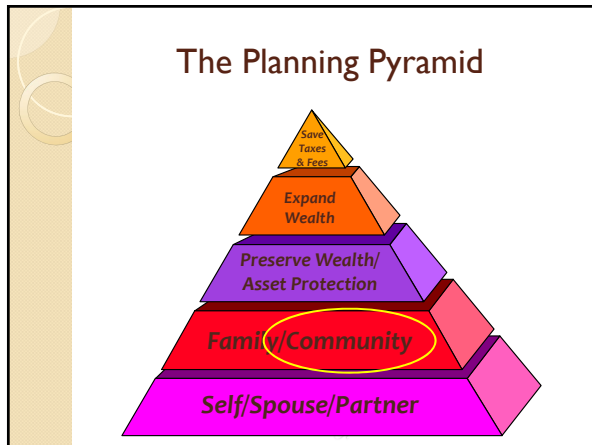
Do you or your children have any special needs or concerns? *NO*

Are you likely to receive any inheritances in the future? *Yes () No (X)*

Do you have any particular areas of charitable interest? *NO*

What are your primary goals in estate planning? (Use extra page if necessary)
*1. AVOID ESTATE TAX
 2. ANY SPECIAL NEEDS/IMPLICATIONS
 3. EXECUTOR'S DUTIES NOW THAT I LIVE IN OREGON
 4. ANY ANTI-DUMPING ESTATE PLANNING RECOMMENDATIONS OR A FUTURE OF FUTURE.*

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The Philanthropic Conversation

Help Your Advisors Bridge the Disconnect

Suggest Having Some “Teaching Tools” at the Ready

- Photo(s) to Inspire Positive Stories
- Books (Midas Curse, Golden Ghetto, Giving)
- Information Packets/Brochures
- Inspiring Quotes
- Inspiring Legacy Stories:
 - Last of the Line
 - Lost Child without Purpose
 - Honoring Parents
 - First to College
 - Giving with Warm Hands
 - WWII Veteran
 - Tikkun Olam

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**“Giving with Purpose:” Philanthropic
Wealth v. Financial Wealth**

Powerful Concept:

Two Separate Tracks

Promotes:	Education
	Stewardship
	Asset Protection
	Family Legacy
	Positive Values
Avoids:	Affluenza



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Inspiring Quotes

You can fight disease.
Inspire children.
Promote the arts.
Save the environment.
Feed the hungry.
Shelter the homeless.
You can stand for the causes you
believe in.
And you can do it forever.
There is no end to the good You can do...

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Inspiring Quotes

“Someone’s sitting in the shade today because someone planted a tree a long time ago.”

- Warren Buffet




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Inspiring Quotes

“It’s not about what you own, it’s about what you value.”

- Eden Rose Brown, Attorney

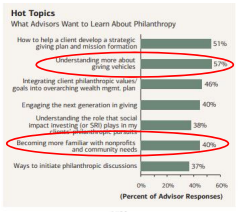


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STRATEGIES FOR ENGAGEMENT

1. Teach Your Advisors

- Clients want guidance from their advisors on how to vet and select causes, but many advisors are unaware or unprepared to meet this need
- Give them the tools they need to “have the conversation”



Topic	Percent of Advisor Responses
How to help a client develop a strategic giving plan and mission formation	51%
Understanding more about giving vehicles	57%
Integrating client philanthropy values goals into overarching wealth mgmt. plan	46%
Engaging the next generation in giving	40%
Understanding the role that social impact investing (or SII) plays in my client's philanthropy	39%
Becoming more familiar with nonprofits and community needs	42%
Ways to initiate philanthropic discussions	37%



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STRATEGIES FOR ENGAGEMENT

2. Become their Resource

- Get acquainted with top advisors and become a resource for them
- Host informational workshops for the advisor and/or their clients
- Help them create strategic plans for their top clients

3. Engage them More Fully

- Meet the president or executive director
- Come for a site visit
- Newsletters for top of mind awareness
- Host advisor lunch and learns

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STRATEGIES FOR ENGAGEMENT

4. Hang Out Where the Advisors Are

- Estate planning councils, financial and tax conferences, Bar meetings, etc
- Network before and after professional meetings, then follow up
- Search out like minded, allied advisors; be yourself and be genuine

5. Be Persistent!

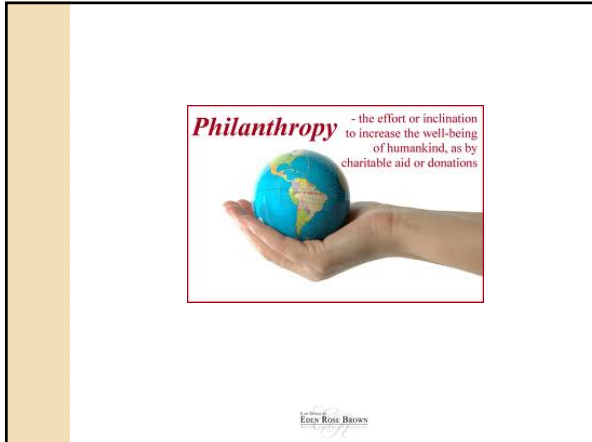
- If you don't ask, the answer is always "no."

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