

The Atchison Area Community Foundation is making it easier than ever for you to help your clients establish charitable funds.

By partnering with AACF, in many instances you may continue to manage your clients' assets while meeting their tax and charitable goals.

In addition, you will be connecting them with one of the most trusted philanthropic leaders in the community. With the help of the Foundation, your clients can support the causes they care about most while gaining maximum tax benefits under the law. At the Atchison Area Community Foundation, we offer a variety of giving options and can assist you in helping your clients achieve their charitable dreams.

Of major importance to legal and financial advisors, community foundations provide an attractive, cost-effective alternative for clients considering the establishment of a private foundation. The client/donor gets superior tax advantages and freedom from annual reporting requirements but can retain the right to advise on grant recipients from his or her fund.



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***[atchisonfoundation.org](http://atchisonfoundation.org)***

## The Atchison Area Community Foundation **PROFESSIONAL ADVISOR PARTNERSHIP**

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Connecting  
Charitable Objectives and  
Investment Solutions



**[atchisonfoundation.org](http://atchisonfoundation.org)**

NO ONE KNOWS  
YOUR CLIENTS  
THE WAY YOU DO.

NO ONE KNOWS  
PHILANTHROPY  
THE WAY WE DO.



- We partner with you
- We help you build stronger relationships
- We help you connect across generations
- You make a difference in the lives of your clients

Our goal is to help you help your clients. \_\_\_\_\_

#### **BENEFITS OF THE PROGRAM**

The program creates a significant and positive impact for your clients' charitable causes.

#### **Professional Advisors can:**

- Convert non-managed client assets, such as real estate, businesses, personal property or art into charitable dollars that you may be able to manage
- Offer clients a value-added service by connecting them to a trusted philanthropic organization
- In many instances, retain your clients' charitable assets at your financial institution and continue to manage your clients' charitable giving

#### **IDENTIFYING CLIENTS WHO QUALIFY**

Potential candidates might include your clients who:

- Plan to sell a private company
- Have high capital gains tax exposure
- Are in a transition phase of life (empty nest, retirement, involved in estate planning)
- Want a charitable tax deduction now with the flexibility to direct distributions in the future
- Want to grow their contributions tax-free over time
- Have a desire to give back to their community
- Want to leave a legacy for future generations

## **Professional Advisor Partnership**

#### **We partner with you.**

We provide support, information, and expertise regarding charitable giving options; think of us as your personal planned giving center.

#### **We help you build stronger relationships.**

Your clients will appreciate the charitable impact and tax advantages you help them achieve by working with a community foundation.

#### **We help you connect across generations.**

When you help families establish an advised fund at the community foundation, you begin an ongoing process of involvement with current and future generations.

#### **You can help make a positive difference in the lives of your clients.**

By partnering with us, you may be able to help your clients increase their current income, increase their heirs' inheritance, and leave a legacy to the community.

**THE ATCHISON AREA COMMUNITY FOUNDATION** can support you and your clients in the charitable giving process by:

- Identifying your clients' charitable giving interests and motivations
- Matching personal charitable interests with tax planning needs
- Creating charitable plans that are integrated into major business, personal and financial decisions
- Facilitating complex forms of giving
- Sharing knowledge about community needs and providing information on local agencies and programs
- Delivering grantmaking expertise and a range of administrative services related to charitable giving
- Leveraging your client's gift with other match grants