

Talking with Your Clients about Philanthropy

Why Should Advisors Have a Conversation about Charitable Giving?

According to recent studies, 91% of high net worth individuals donate to charitable organizations. By engaging in conversations about philanthropy with your client, you have an opportunity to deepen your relationship and provide comprehensive, unbiased information so they may make good long-term decisions. CFGG is here to provide philanthropic resources you need.

When Should Advisors Have a Conversation about Charitable Giving?

- Writing or revising a will or trust
- Planning for year-end tax strategies
- Preparing for the sale of a business or major asset
- Planning for retirement
- Receiving an inheritance
- During annual financial reviews

How Should Advisors Start a Conversation about Charitable Giving?

Do you currently support any community groups or charitable organizations monetarily or with volunteer time?

Would you be interested in exploring other ways to support your favorite cause(s)?

Are you interested in creating a personal or family legacy?