The Power of Philanthropy

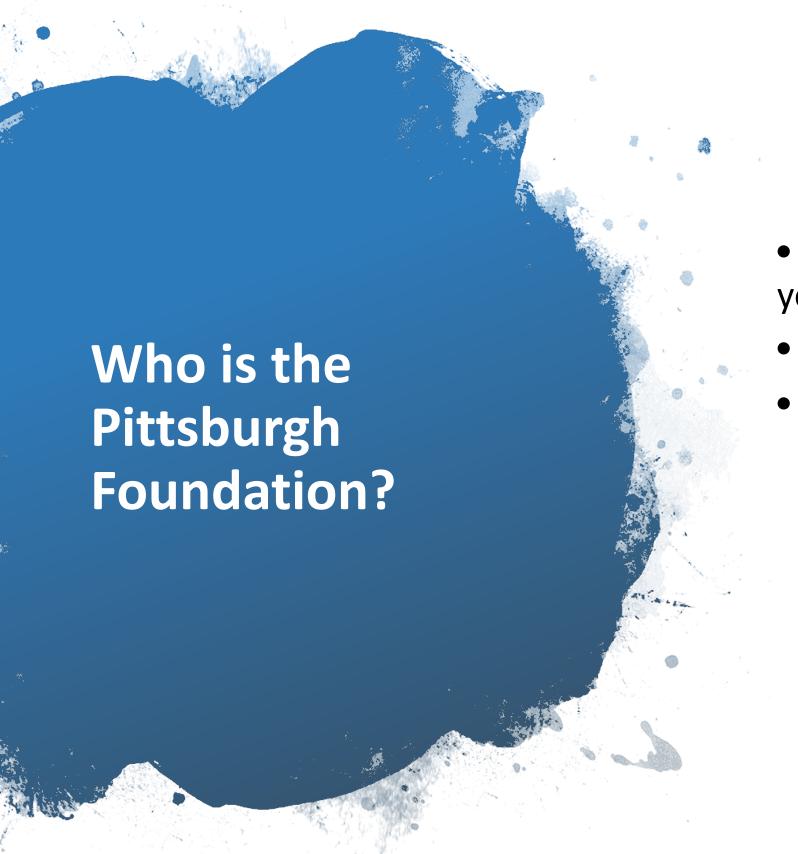
Development Officer

Presented to:

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WHOWEAREAND WHAT WEDO HOWWEWORK WITH YOU AND YOUR CLIENTS THINGS TO CONSIDER CHARITABLE GIVING STRATEGIES AND TOOLS



- Local Community Foundation for 75 years
- \$1.2 B under asset management
- Over 2,500 component funds
 - Donor-advised, scholarship, designated
 - 2018: granted \$48 M back into the Pittsburgh community

What kind of client should you be looking for?



- Already charitably inclined
- Possibly looking for deeper charitable connection
- Single or married with no kids
- 70.5 or older IRA QCD
- Would benefit from utilizing our suite of donor services
- Weighing different giving options
- Wants to leave a legacy for family

When do clients give?

Give now

- Enjoy philanthropy during lifetime
- Cash/check or online
- Stock transfer

Give over time

- Grant money to charities of choice
- DAF's
- Give as a family; next gen involvement
- Engage around something meaningful

Give at death

- Leave a legacy
- Bequests
- Beneficiaries

Charitable Tools: Private Foundations, DAF's, directly to charity – what's the difference?

Things to consider

- Type and timing of asset being used
- Who do they want to involve in giving
- What are their investment goals associated with the charitable asset
- What level of privacy does the client want (if any) and who can provide that

Spotting Opportunities: Third Party Investment Manager Program

Continued management of charitable asset

Deeper connection to client through philanthropy

Strengthen ties to next generation

Spotting Opportunities: AUM vs. AUR

Generational succession

Ensuring your practice

Engaging through grief (loss of a spouse/partner)

Deeper conversations









Leaving a Legacy



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Amy B. Razem
Development Officer
412.394-4291
razema@pghfdn.org

