



# Working with Professional Advisers

Helping your clients make the most of their giving



## **PROFESSIONAL ADVISERS**

**We work with solicitors, accountants, wealth managers and financial advisers to help their clients make the most of their giving.**

As a professional adviser, you will have clients who care about and want to give something back to their community, but may not know where to start. Being able to help them with their philanthropy provides you with the chance to broaden and deepen your relationship with some of your key clients.

Kent Community Foundation is the ideal vehicle for people who want to put something back into the communities in which they have lived and worked.

Research shows that wealthy people and businesses want to know more about effective charitable giving. Each change in your client's financial or family circumstances is an opportunity to talk about philanthropy. There are also many tax benefits to planned giving that your clients may wish to explore.

## **TAILOR-MADE, COST-EFFECTIVE AND TIME- SAVING SOLUTIONS**

We can work with you and your clients to help shape and develop a more structured approach to their charitable giving. We make it easier to give both locally and effectively by offering simple, cost-effective and tax-efficient solutions. For example, if your client is considering establishing a charitable trust, we can offer a more convenient alternative in the form of a named fund.

From the client who wants to make an immediate philanthropic impact, to the couple hoping to leave a legacy, to the family who want to establish a memorial fund in honour of a loved one, we can help you find the best solution – tailor-made to ensure that the wishes of your client can be acted upon.

## **WHY WORK WITH US?**

We are the charitable referral partner of choice for professional advisers throughout the county offering accredited expert, and often free, advice.

- Using our comprehensive knowledge, we help your clients to give in Kent and Medway; we help them to make the greatest impact with their money locally.
- As accredited philanthropy advisers we are a resource to be called upon by you to help shape the future philanthropic objectives of your clients.
- We are a safe pair of hands for legacies; we ensure that your clients' wishes for giving to Kent are fulfilled, and we provide you with a single point from which to distribute monies locally.
- Working alongside the Charity Commission, we are breathing new life into existing trusts that are finding it hard to reach local communities.

## KEY BENEFITS

- We offer a flexible, quick and easy alternative to setting up a charitable trust
- A named fund can be set up in a one hour meeting
- A personal donor service with dedicated account manager
- Grants can be awarded anonymously
- We arrange publicity if desired
- We target money to charitable groups by issue or geographic area
- We provide a service managing existing charitable grant making trusts by recreating them as fund within the Community Foundation

## WHY REFER CLIENTS

It's good for your business, your clients and the community.

Research shows that wealthy people want to learn more about charitable giving from professional advisers. We can help you approach the subject of philanthropy and become better informed about the role philanthropy can play in estate planning. It can add an important element in the service you offer to your clients.

## OPPORTUNITIES FOR GIVING

Each change in your client's financial or family circumstances is an opportunity to talk about philanthropy. By creating a charitable fund, you can help your clients reduce the tax they pay.

Key opportunities for presenting charitable options:

- Utilising disposable income
- Financial planning or investment strategy review
- Realisation or maturity of an investment
- Disposing of property or shares
- Disposing of a business
- Inheritance tax, estate and will planning
- Planning for and at time of retirement

“We are delighted to be working with Kent Community Foundation. They have enabled us to establish a significant legacy fund that will continue to benefit local communities for years to come, and the means to reach out to many more Kent children's charities than would have been possible if we had attempted to manage the trust independently.”

Ian Priston, Boys & Maughan Solicitors  
for Albert Burns Children's Trust Fund





## About Kent Community Foundation

KCF helps individuals, families, businesses and trusts and foundations establish and administer their own charitable funds to support the causes that mean the most to them in Kent and Medway.

Established in May 2001, KCF has distributed over £34 million in grants and now provides financial support to hundreds of charities and deserving causes throughout the county each year – particularly small, local charities, where a modest sum of money can make a significant impact.



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