The Client Conversation: Adding Value Through Community

Welcoming

Kathlyn Mead - San Diego Foundation
Marjory Kaplan - Jewish Community Foundation
Christy Wilson - Rancho Santa Fe Foundation
Agenda

1. Overview of each Community Foundation

2. Top Ten Reasons

3. Questions and Discussion
Community Foundations Overview
10. To know about the community and where to give
9. To involve the younger generations in giving
8. To time gifts for tax planning with no pressure to allocate right away
7. To preserve donor intent
6. To offer help with charitable planning and planned giving
5. To manage philanthropy with convenient, efficient and friendly resources
4. To connect donors with each other
3. To encourage the creation of permanent funds to support community organizations.
2. To create strategic, flexible giving plans
1. To associate with trustworthy, transparent stewards of community assets
Thank You

• Questions and Discussion