



Financial Advisor Program

Making the Most of Charitable Financial Opportunities

The Nevada Community Foundation is making it easier than ever for financial advisors to help their clients establish charitable funds. You continue to manage the assets, and at the same time, meet your clients' tax and charitable goals.

In addition, you will be connecting your clients with a trusted leader in the philanthropic field. Nevada Community Foundation is nationally recognized for its philanthropic investment expertise, customized philanthropic solutions and in-depth knowledge of greater Las Vegas and beyond. Instantly you and your clients will have access to a team of professionals who will make sure each charitable investment provides the greatest emotional, civic and financial benefit possible.

Benefits

The Financial Advisor Program is a win-win for everyone involved, creating a significant and positive impact for your clients' charitable causes.

Financial Advisors can:

- Retain their clients' charitable assets at their financial institution and continue to manage their clients' charitable giving vehicles.
- Convert non-managed client assets, such as real estate, closely-held interests, businesses, personal property and art into charitable dollars that the advisor will manage.
- Offer clients a value-added service by connecting them to the best charitable giving product on the market.

Identifying Clients Who Qualify

Candidates for this program might:

- Plan to sell a private company;
- Have a high capital gains tax exposure;
- Be 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 something back to their community;
- Want to leave a legacy for future generations.

Questions? Please call us at (702) 892-2326 or email donorservices@nevadacf.org or visit us at www.nevadacf.org.



Financial Advisor Program

Helping your clients
achieve their
charitable goals

Consider us a resource.