

## Why discuss Charitable Giving

Your clients are increasing their knowledge about options and expecting you, their advisor, to help them create innovative, comprehensive financial plans that take care of the individual, their families and businesses, minimize taxes and reflect their values. Also, with an upcoming transfer of wealth, people are increasingly choosing to integrate charitable giving into their planning to realize personal as well as financial benefits.

- Charitable giving can generate **significant tax benefits** in both annual and estate tax situations – your client may not be aware of this opportunity.
- The ability to provide for a charitable gift often produces a **deep sense of fulfillment and satisfaction** – your client may be very grateful to you for not only asking the "giving question", but also helping him/her to satisfy that philanthropic desire.
- Your client may never have mentioned an interest in charitable giving – perhaps due to a disappointing experience or to **lack of information** about the range and scope of opportunity. You can offer your client an opportunity to become informed without any obligation.
- Your client may think that his/her resources are not sufficient to consider charitable giving. You can show your client a variety of **creative ways to make a gift** that is compatible with his/her personal and financial circumstances.
- You'd be surprised how many of your clients are **searching for a way to give back** to society, to memorialize a loved one, or simply to do good.
- It's **good** for society, it's good for your clients, it's good for your business, and it's good for you.