



Is giving through a community foundation right for your clients?

Seven questions for estate & financial advisors

1. Do I have clients who care deeply about their local community?
2. Do they give to more than one charitable cause?
3. Are they interested in creating a personal or family legacy in their community?
4. Are they considering the creation of a private foundation, but concerned about cost and administrative complexity?
5. Would they like to stay personally involved in the use of their gift dollars?
6. Do they want to receive maximum tax benefit for their charitable contributions under federal law?
7. Do they place a priority on sound financial management of their contributions?

If you answered **yes** to any of these questions, your clients would benefit from knowing more about the Davie Community Foundation!



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