

BENEFITS OF A COMMUNITY FOUNDATION



WHETHER YOU ARE an attorney, estate planner, accountant or financial advisor, you always have your clients' best interests at heart. So do we.

For more than 20 years, Chillicothe-Ross Community Foundation has worked hand-in-hand with the region's professional advisors to help their clients achieve their goals through philanthropy. Our experienced staff works with advisors to create giving strategies that are meaningful, tax-wise and effective for clients from all walks of life. As a behind-the-scenes philanthropic partner, we also handle all the administrative work so advisors can focus on building relationships and meeting the financial and charitable needs of their clients.

WHY ADVISORS PARTNER WITH CHILLICOTHE-ROSS COMMUNITY FOUNDATION:

1. We are a cost-free resource for charitable planning

From setting up affordable alternatives to private foundations to creating charitable instruments that provide a lifelong stream of income, we offer customized, tax-smart giving solutions to meet your clients' needs.

2. We simplify your paperwork

We offer easy-to-understand fund agreements that can be tailored to your clients' unique wishes and situations. Funds can be started in as little as a day, and they may be named in a way that protects your clients' privacy or recognizes their family or business.

3. We are experts on Greater Ross County

Our in-depth knowledge of the region's issues and nonprofits enables us to provide personalized grantmaking assistance to your clients, if and when they need it.

4. We respect your role as your clients' trusted advisor

We may be part of the conversation, but you will always remain in control of your client relationships. Our primary goal is to equip you with resources that can help you meet your clients' financial and philanthropic goals in a uniquely personal way.

5. We thank you publicly

Professional advisors play a key role in making philanthropy happen. We're pleased to offer public recognition for your commitment to our community and your clients through our website and other communications.

6. We connect you with other advisors

Our luncheons and seminars for legal and financial advisors offer networking opportunities with the region's brightest professionals. Advisors are often called together to help bring perspective and experience to our work in the community.

7. We preserve your hard-earned relationships

Qualified investment managers who have been approved by our board have the opportunity to continue managing their clients' charitable assets. This also opens the door to building relationships with the next generation of your clients' families as they get involved in philanthropy.

8. We accept a wide range of gifts

From life insurance and highly appreciated stock to more complex gifts like real estate and partnership interests, we make giving easy and ensure your clients receive the maximum tax benefit.

9. We make your clients' giving go further

Our long-term investment strategies protect and grow your clients' charitable assets so they can support their favorite causes for years to come.

10. We offer unparalleled service

We provide an array of concierge-level support services to your clients, including personal consultations with our staff and visits to local nonprofits – all at no cost. We also provide resources for advisors, from up-to-date information on charitable tax law to online giving tools.

LEARN MORE

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