

PHILANTHROPY AND THE ROLE OF ADVISERS

As Professional Advisers, helping a client realise a philanthropic vision provides an opportunity for you to do what you do best – identify creative solutions that help your clients achieve their goals.

This Fact Sheet outlines some of the reasons and benefits to providing philanthropic advice.

THE ROLE OF THE PROFESSIONAL ADVISER

At Australian Communities Foundation (ACF), we see first-hand the value that professional advisers add to their clients by blending philanthropy with overall financial and estate planning strategies.

Top reasons for providing philanthropic advice

- The ability to provide truly **holistic advice** that leads to increased levels of client satisfaction.
- **Value-add.** Providing philanthropic advice can enhance your value as an adviser and be a point of difference. Taking an active approach can build deeper, richer client relationships, enhance client loyalty, and strengthen the perception of better service. A 2012 Bank of America Study of High Net Worth Philanthropy revealed there is a growing demand by individuals relying on their professional adviser for support with their charitable giving. Helping a client add value to his/her planning can also enhance the value of you as an adviser.
- **Flexibility.** Incorporating philanthropic products into advice strategies may reduce client tax liabilities providing additional investable assets.
- You, in partnership with your client, can have a **positive impact** on the world you live in.

HOW CAN ACF HELP?

At ACF, we believe advisers do not need to be experts in charitable giving and philanthropy but you need to be able to know the best time to raise the subject, what the giving options are and to be able to support and guide your clients so they can achieve their philanthropic goals.

ACF can partner with you to provide the philanthropic expertise you require to support your clients. From Fact Sheets to brochures, workshops and lunches for professional advisers, we can help you make providing philanthropic advice easy.

NEXT STEPS

If you would like, ACF is available to help you explore philanthropic giving further. We also help donors learn about issues and meet with leaders of not-for-profit organisations as part of establishing a plan for giving. If you would like to discuss this further or obtain brochures, please call ACF on (03) 9412 0412.