



Help Clients Give with Purpose: The Community Foundation Advantage





Outcomes for Today's Presentation:

1. Recognize charitable planning opportunities within client conversations
2. Learn about the charitable giving landscape, including DAF sponsors from national organizations, community foundations, and financial institutions
3. Identify scenarios where a community foundation can help make giving easier, more strategic, and more meaningful
4. Understand how charitable conversations can deepen client relationships, support multigenerational planning, and create value for your business



A Community Foundation Unlike Any Other

Dedicated to improving the lives of people in Jefferson County and building nonprofit and donor capacity statewide.

Connection of people, ideas and nonprofits so **together we can build resilient, connected and thriving communities, which is good for everyone.**

Statewide Capacity Builder for Nonprofits and Donors

Investing in:

- Free Digital Fundraising on ColoradoGives.org
- Colorado Gives Day
- Donor Services
- Giving Funds
- Endowments
- Group Giving

Our Work for a Thriving Jefferson County

Providing millions in grants annually in addition to:

- Convening
- Impact Investing
- Advocacy
- Data and Research

All aligned with our Impact Areas so that all of Jeffco is thriving.

Our Vision is that all of Jeffco is Thriving



We believe a thriving Jeffco is a place where **collective wellbeing** is prioritized, ensuring everyone's basic needs are met. It's a place that provides **economic freedom** so that everyone prospers, and where **vibrant communities** foster connections, promote holistic wellbeing, and provide convenient access to the things that improve quality of life. It's a place where we **all** belong.



Charitable Conversations Matter for You and Your Clients





Charitable Planning Matters for Advisors

- Charitable giving is no longer just a year-end tax conversation
- For many clients, it is connected to values, family, legacy, business transitions, retirement planning, and local community impact
- Advisors who can identify these moments can deepen relationships and bring more value to the planning process.
- Stronger relationships + Trust = Longer Client Relationships, Greater Assets Under Management, and Better Outcomes





The Client Behind the Portfolio

Charitable planning helps advisors:

- Learn more about the person behind the portfolio, including values, motivations, and hopes for the future
- Create more meaningful conversations that go beyond investments, taxes, and account balances
- Support broader planning needs related to estate, tax, retirement, and legacy goals
- Engage spouses, children, and future generations in values-based planning conversations
- Stand out by offering a client experience rooted in purpose, not just performance





Unlocking Client Motivations: 10 common reasons

1. Values Alignment

Giving reflects personal beliefs and identity.

2. Personal Connection

Direct experience with a cause drives action.

3. Making Impact

Desire to see measurable, tangible results.

4. Offering Gratitude

Giving back for opportunities or support received.

5. Leaving a Legacy

Creating lasting impact beyond one's lifetime.

6. Social Influence

Family, peers, and networks shape giving behavior.

7. Emotional Fulfillment

Giving provides purpose, joy, and meaning.

8. Moral or Religious Duty

Ethical or faith-based obligation to give.

9. Financial Strategy

Tax efficiency and planning considerations.

10. Recognition

Appreciation, visibility, or reputation.

Sources:

- Indiana University Lilly Family School of Philanthropy
- Association of Fundraising Professionals



Keeping the Family at the Table

Charitable planning can help advisors:

- Engage the next generation in conversations about values, purpose, and family legacy
- Strengthen relationships with heirs before wealth transfers occur
- Create opportunities for families to make giving decisions across generations
- Partner with a community foundation to help families turn charitable intentions into meaningful impact





Charitable Giving in Today's Environment





The Charitable Giving Landscape

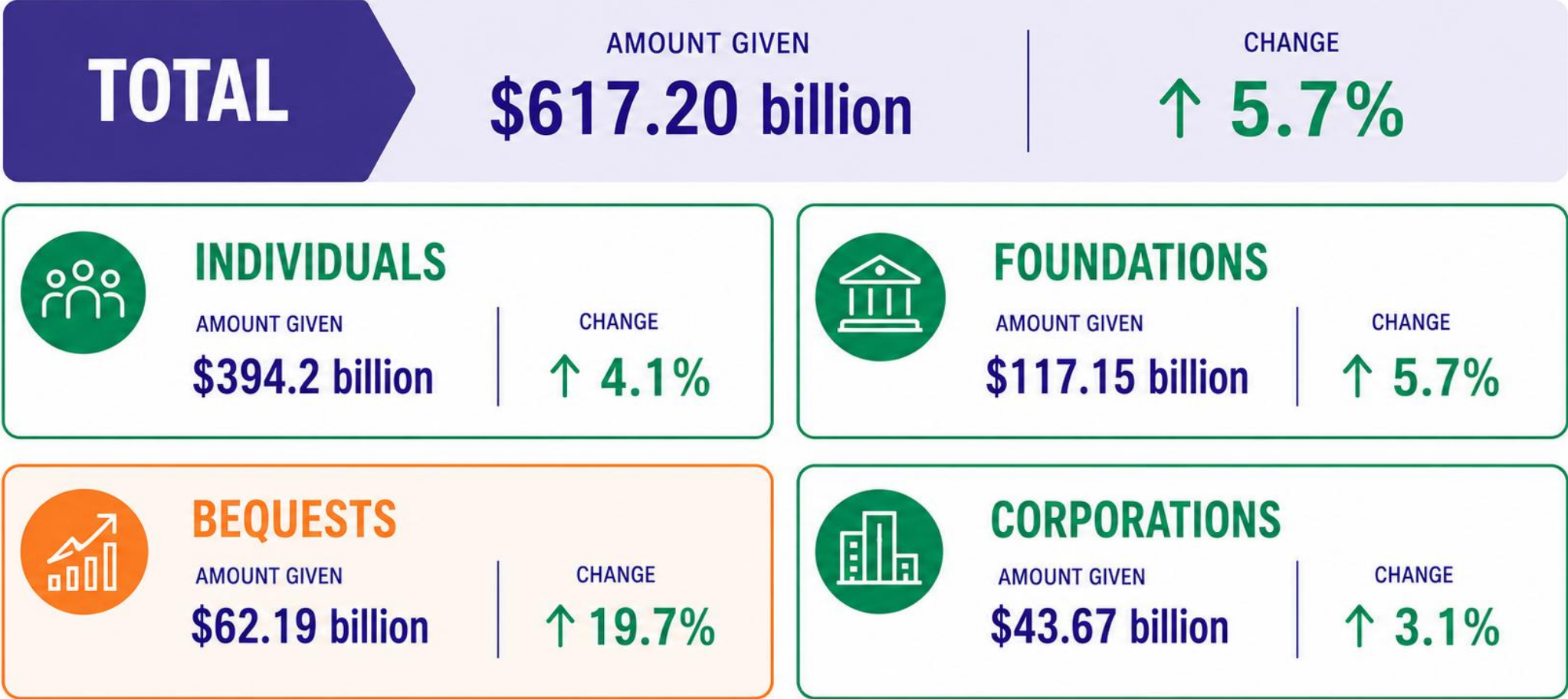
- U.S. charitable giving reached \$592.5 billion in 2024, a record in current dollars, and individual giving made up the largest share.
- Last year, total giving grew 3%, reaching a new high. A strong stock market and GDP growth helped fuel the increase in total giving, which was led by individual and corporate giving.
- Donor advised funds continue to grow as a major charitable planning tool, with DAF assets reaching \$327.87 billion in 2024 and contributions totaling \$90.57 billion.
- Fidelity Charitable reported \$14.9 billion in donor-recommended grants in 2024, with grant dollars five times higher than ten years earlier.

Sources:

DAF Research Collaborative; Fidelity Charitable Giving Report



Charitable Giving By Source (2025)

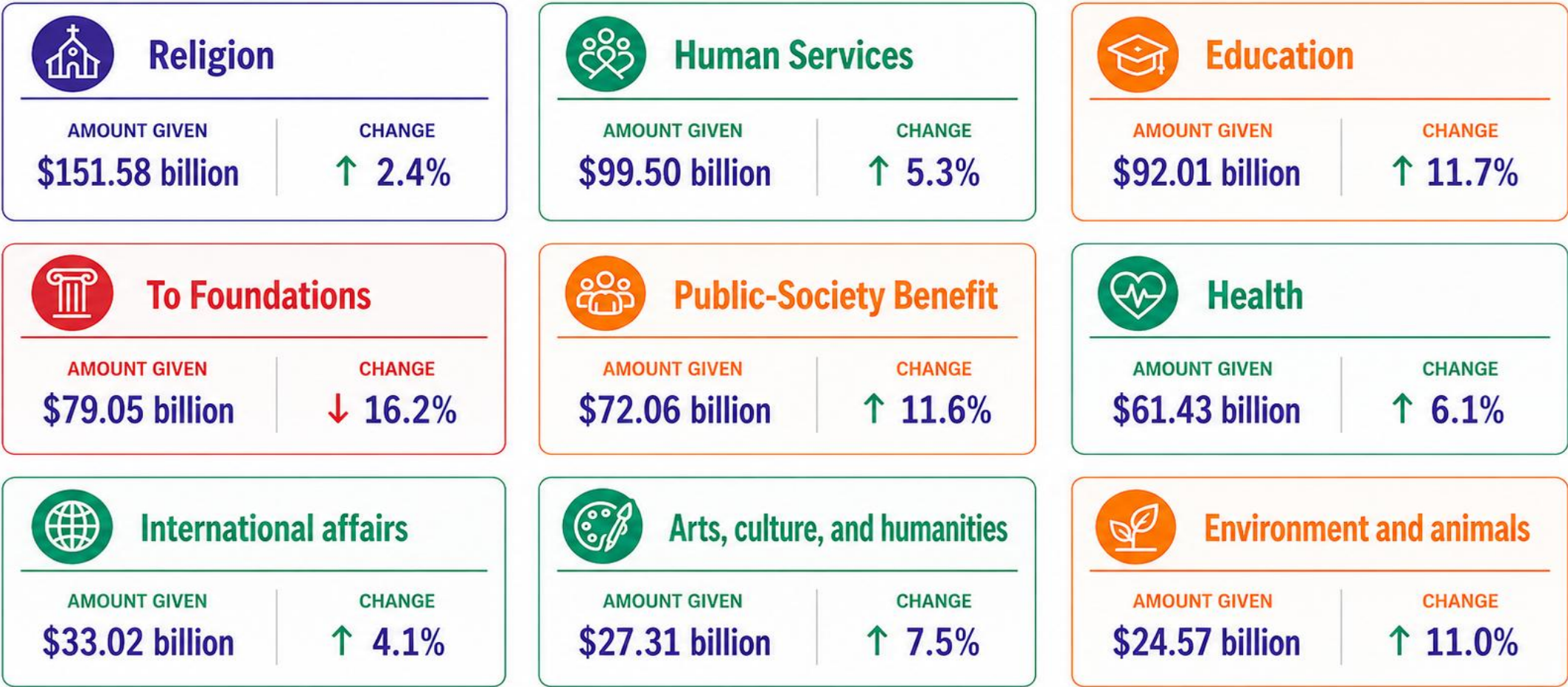


Sources:

GivingUSA.org 2025 Report



Charitable Giving to Recipients (2025)



Sources:

GivingUSA.org 2025 Report



Where Clients Can Give:

Examples to support your client's charitable needs

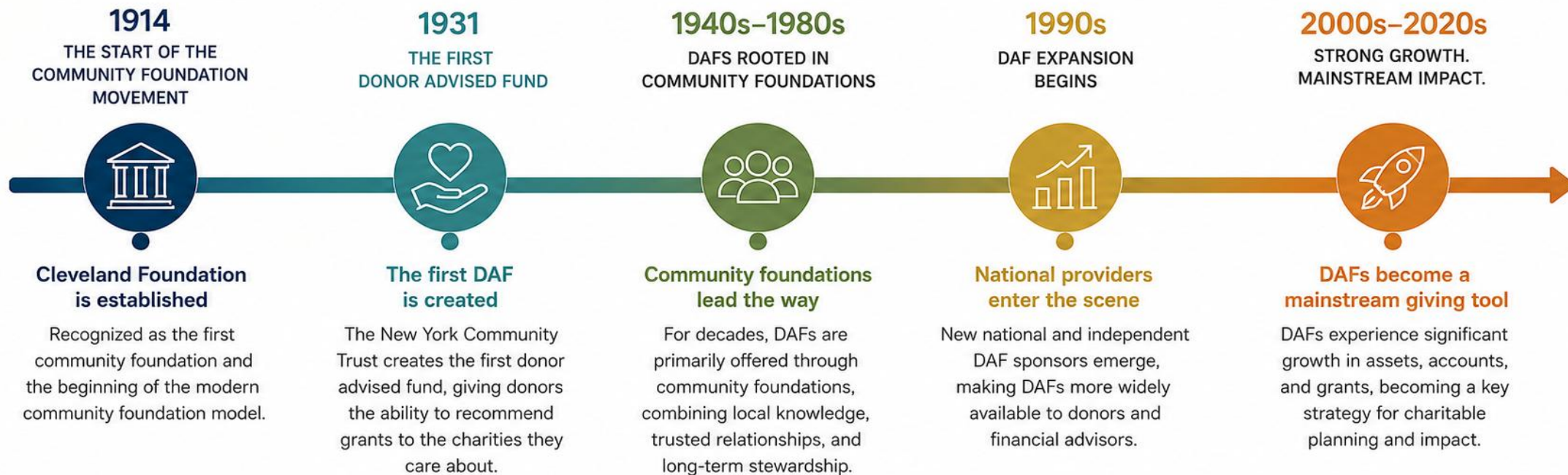
1. Direct gifts to nonprofits
2. Donor advised funds
3. Endowments: create or contribute to an established fund
4. Planned gifts and beneficiary designations
5. Private Foundations



The right option depends on the client's goals, desired involvement, tax situation, family dynamics, complexity, and interest in local expertise.

The Evolution of Donor Advised Funds

Nearly a Century of Impact. Accelerated Growth. Lasting Philanthropy.



TODAY: DAFS ARE THRIVING

As of FY 2024: 1,512 sponsors | 3.59 million accounts | \$327.87 billion in assets | \$64.60 billion in grants

From local innovation to national impact—DAFs continue to empower generous giving and strengthen communities.

Sources: Cleveland Foundation, The New York Community Trust
National Philanthropic Trust; DAF Research Collaborative, 2025 Annual DAF Report.



Understanding the DAF Landscape

As of fiscal year (FY) 2024, there were 1,512 DAF sponsors based in the United States (US), including 103 national sponsors, 803 community foundations, and 606 single-issue charities.

Financial Institution Giving Platforms:

- Fidelity Charitable, DAFgiving360, and Vanguard Charitable

Community Foundations:

- Colorado Gives Foundation, Community Foundation Boulder County, NoCo Foundation, Rose Community Foundation, The Women's Foundation of Colorado

National or Faith-Based Providers:

- iGiftFund, National Christian Foundation, National Philanthropic Trust



Sources:

DAF Research Collaborative Annual DAF Report 2025



Comparing DAF Sponsor Options

How different sponsor types align with common client needs

 Client Need	 Financial Institution Giving Platforms	 National Provider	 Statewide or Regional Options	 Community Foundation
 Simple charitable account	 Strong fit	 Strong fit	 Strong fit	 Strong fit
 Transaction efficiency	 Strong fit	 Strong fit	 Strong fit	 Strong fit
 Local nonprofit knowledge	 Limited	 Limited	 Varies	 Strong fit
 Philanthropic advising	 Varies	 Varies	 Strong fit	 Strong fit
 Family and legacy planning	 Varies	 Varies	 Strong fit	 Strong fit
 Advisor investment option	 Strong fit	 Varies	 Varies	 Strong fit



The Community Foundation Difference

1. Local expertise

Knowledge of nonprofits, community needs, and local opportunities

2. Philanthropic advising

Helps clients clarify their charitable goals and giving strategy

3. High-touch service

More than an account — a philanthropic partner

4. Flexible giving options

DAFs, endowments, legacy gifts, nonprofit funds, and advisor managed funds





Let's Dive into Donor Advised Funds





DAFs 101: Flexible Giving Charitable Account

The Basics:

- Donor makes irrevocable charitable contribution
- Receives immediate charitable tax deduction
- Assets can be invested for potential growth
- Recommends grants to eligible nonprofits over time
- Sponsoring organization handles administration, grant processing, and nonprofit due diligence





Client Signals: When a DAF Makes Sense

Listen for these:

- Gives to multiple nonprofits, wants simpler giving, feels disorganized
- Has appreciated assets, a liquidity event, or a high-income year
- Wants a deduction now and time to grant later
- Wants to involve family in giving decisions
- Generous but unsure where to give





DAF Benefits: 10 reasons to partner

1. Immediate Tax Deduction:

Receive a charitable tax deduction in the year you contribute.

2. Flexible Giving:

Make giving easy by contributing today & decide later what nonprofits to support. Set up recurring gifts to set it and forget it.

3. Invest For Growth:

Contributions are invested, can increase the amount available for future grants. All growth goes back in DAF.

4. Give Anywhere:

Donate to any eligible 501 (c)(3) nonprofit around the country.

5. Family Involvement:

Invite children or other family members into the giving process, creating a tradition of philanthropy across generations.

6. Online Account:

Easy-to-use online account to make grant recommendations and locate statements.

7. Privacy Option:

Choose whether to share contact information or give anonymously.

8. Dedicated Support:

Responsive service from a team that knows you well.

9. Community Experts:

Partner with knowledgeable staff who understand community needs and local nonprofits. Some DAF sponsors can create customize giving plans and serve as a philanthropic partner.

10. Local Charitable Contributions:

Your dollars stay close-to-home, supporting nonprofits and community needs around the state.



What prompts a Charitable Giving Conversation?





Planning Opportunities

- Financial Planning Opportunities
 - ✓ Business sale
 - ✓ Appreciated stock, Concentrated position
 - ✓ Retirement planning
 - ✓ EOY + Tax planning
- Family and Legacy Planning Opportunities
 - ✓ No heirs
 - ✓ Unclear estate plan
 - ✓ Desire to involve next Gen
 - ✓ Beneficiary planning
- Charitable Giving Opportunities
 - ✓ Client is generous but unorganized
 - ✓ Client wants to support Colorado but does not know where to start





When to Introduce a Community Foundation

- **The tax-smart giver**
Has appreciated assets, RMDs, business sale proceeds, or bunching opportunities.
- **The values-driven giver**
Wants more meaning, clarity, and confidence in giving.
- **The legacy-minded client**
Wants to create something lasting beyond their lifetime.
- **The family-centered client**
Wants to involve children or grandchildren.
- **The locally connected client**
Cares about Colorado, Jeffco, or a specific community.
- **The overwhelmed giver**
Is generous but unsure which nonprofits are effective.





Let's Meet Lynn and her children

Family Engagement: Next Generation Philanthropy

- Donor opened DAF after husband passed away
- Fund name honors her husband + family legacy
- Adult children included in giving conversations
- Funded with appreciated stock
- Creates shared way for the family to give together
- Family used ColoradoGives.org to donate





Let's Meet Cindy and her Advisor Julia

Long-Term Planning: Sustained Community Support

- Donor wanted her charitable dollars to support nonprofits after her lifetime
- Six nonprofit beneficiaries selected based on interests
- Advisor continues investing funds during 20-year term
- Manage fund administration and distributions
- Donor feels confident her giving will create lasting impact



Keith is going to have more availability

Business Owner Transition: Tax-Efficient Giving

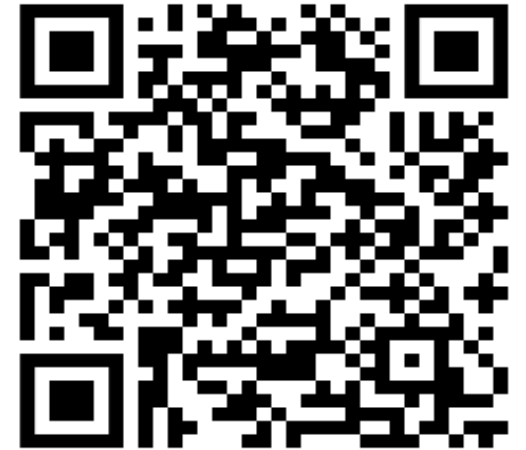
- Business owner recently sold his company
- Worked with exit planner to increase value before sale
- Charitable planning helped support tax-efficient giving
- Transition included giving options, volunteering, board service, and community connections
- Opened DAF now and updated trust documents for future legacy giving





You know your clients. We know giving.

- ✓ Support you with philanthropic planning
- ✓ Offer charitable giving vehicles with local impact
- ✓ Serve as a trusted partner to support your clients
- ✓ Make charitable giving easy and joyful



Questions?

Scan to sign up
for our newsletter.

Thank You



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ColoradoGivesFoundation.org

50
years of
making
good
happen
together