

Several Ways We Can Support

Your clients rely on your guidance to make important financial, tax and legal decisions. When it comes to charitable giving, we can support you to simplify their giving and amplify their impact.



Trusted Philanthropic Partner

You are an expert in your field. Let us be yours in philanthropy. We will share our knowledge of giving tools and strategies, as well as provide education on pressing needs, promising opportunities and local nonprofit organizations providing strategic solutions.

As a benefit of establishing a charitable fund through the Community Foundation, we can help your clients develop personalized and strategic giving plans, engage younger generations in charitable conversations and help guide businesses to maximize community impact opportunities.



Charitable Funds

Your clients can open a charitable fund at the Community Foundation. A variety of fund types are available to help your clients meet their unique charitable giving goals. For example, donor advised funds are a popular philanthropic vehicle that allows your clients to make charitable contributions, receive an immediate tax deduction and recommend distributions to their favorite causes and communities over time.



Retain Client Assets

Through our Charitable Investment Partner program, wealth planners can invest assets in a Community Foundation charitable fund on behalf of their clients, while maintaining the assets under management.

Our Distinct Advantage

Community Foundations are experts in your clients' local communities, ready to share knowledge on the pressing needs and promising opportunities of their region. We are focused on building personalized giving strategies that maximize clients' charitable investments, share the joy of giving and create the best plan for a legacy of impact.

By working with the Community Foundation, it makes you part of the change we enable in the communities we serve. It's through efforts such as community convenings, strategic grantmaking, donor connections, facilitated dialogues, nonprofit trainings and the promotion of charitable giving that we help transform the communities we call home. *We're simply better together.*



The Community Foundation's exceptional staff, investment knowledge and administrative expertise provide the support I need to help clients achieve their charitable intentions with confidence.

KELSEY R. SJOBLUM, J.D.

*Attorney
Duncan Green, P.C.*

Benefits of Working with Us



Processing Non-Cash Gifts

Cash is easy to donate, but it may not be the best option for all situations. We make it easy to donate tax-wise, non-cash assets such as stock, real estate, business interests, personal tangible property, retirement plan assets, life insurance, agricultural assets and much more.



Endow Iowa Tax Credit

Your clients may qualify for the 25% state tax credit for gifts made to Endow Iowa qualified funds held at the Community Foundation.



Simplify Estate Plans

If your clients want to leave a charitable legacy beyond their lifetimes, including the Community Foundation in their estate plan streamlines the process. A variety of gifts are accepted including gifts from a will, trust, life insurance policies, IRAs, 401(k) plans, real estate, charitable gift annuities, charitable remainder trusts and many more.



Networking & Continuing Education

We host events throughout the year so you can connect with other financial, legal and tax planners, while you stay up-to-date on charitable tax rules, community initiatives and nonprofits working to address needs in our area. We also provide a variety of engagement opportunities you and your clients can attend together.

We Make Your Job Easier

Since 1969, your Community Foundation has served as a trusted steward, carefully administering the generous gifts we receive. With over 2,700 charitable giving funds and \$1 billion in assets under administration, we proudly represent 46 county and community affiliates across the state.

We are honored to serve as a valuable philanthropic partner for you and your clients. We welcome the opportunity to answer questions about charitable giving and serve as a resource. We look forward to working with you.



The Community Foundation is a good local partner for clients. They can educate donors on area nonprofits, identify where their passions are and how to connect that to who they want to support.

DAVID STREGÉ, CFP®, CFA, CKA®
Co-founder
Syverson Stregé

If you would like more information on how we can support you and your clients, visit us at: desmoinesfoundation.org/professional-advisors



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