

Professional Advisor Partners

High Net Worth consumers express a desire to have philanthropic conversations early in the client/advisor relationship.

58% want an advisor to bring up the topic at their first meeting and most want the advisor to bring up philanthropy within the first several meetings, when they expect the advisor to fully understand them.

-2018 THE U.S. TRUST® STUDY OF THE PHILANTHROPIC CONVERSATION Understanding advisor approaches and client expectations. Conducted in partnership with U.S. Trust & The Philanthropic Initiative

23% report working with advisor on charitable giving (and feelings afterward)

-PR Newswire: Edward Jones study (Morning Consult survey, 2022)

81% of affluent households made charitable contributions in 2024.

-2025 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households, conducted with the Indiana University Lilly Family School of Philanthropy.

A professional advisor plays a critical role in helping clients realize their philanthropic and financial objectives by listening for giving opportunities, explaining options, and suggesting solutions. Significant giving opportunities often arise when clients are making major business, personal, and financial decisions.

Simplify Your Client's Giving

By partnering with CFAAC, you can make it easier for your clients to give effectively and maximize their tax benefits. With a single gift of \$10,000 or more, your clients can establish a fund at CFAAC that allows them to qualify for an immediate tax deduction and give to the causes they care about most. It's like having their own private foundation; only without the hassle and expense.

- Clients have the opportunity to establish a named fund or remain anonymous.
- We administer and process grants and provide custom reports summarizing all grantmaking activity.
- We offer flexible and expertly managed investment options.

Consult with Experts

- Our experienced staff help donors develop their philanthropic giving strategy.
- We monitor all areas of community need—including human services, education, the environment, healthcare, the arts, and economic development.
- We offer opportunities for donors to learn more about local organizations and programs that are making a difference in our community.
- We help increase knowledge and awareness about the issues in our county that impact the economy and quality of life.

Retain Your Clients

- Our **Partner Investment Program** allows donors to establish a fund while keeping their current advisor to manage the assets and receive investment management fees. Visit www.cfaac.org for more details.

Care. Connect. Contribute.

There are multiple ways we can partner with you and your clients:

- Strategic Giving
- Year-end Tax Planning
- Estate Planning
- Charitable Remainder Trusts
- Charitable Lead Trusts
- Donor Advised Funds vs Private Foundations
- Closely Held Stock
- Sale or Disposition of Highly Appreciated Stock
- Sale of a Business
- Substantial IRA/401(k) Assets

The Community Foundation of Anne Arundel County (CFAAC) is celebrating 25 years as a tax-exempt, 501(c)(3), publicly supported philanthropic organization with the long-term goal of building permanent funds that provide support to local nonprofit organizations through grants and special projects. Our mission is to inspire and promote giving in Anne Arundel County by connecting people who care with causes that matter.

Established in 1998, CFAAC is one of the largest funders of nonprofit organizations in Anne Arundel County. CFAAC distributes \$6 to \$9 million annually. Learn more at www.cfaac.org.

CFAAC hosts the Anne Arundel Estate Planning Council (AAEPC). The Council's mission is to provide opportunities for wealth and estate planning professionals from various disciplines to interact, share ideas and build relationships that will allow them to better serve their clients and the community. Visit www.aaestateplanning.org to learn more.

Learn more by calling 410.280.1102 or visit our website www.cfaac.org.