



THE GREATER
CINCINNATI
FOUNDATION



Unique Solutions for Your Clients

RESOURCES FOR PROFESSIONAL ADVISORS

Each of your clients is unique – especially when it comes to charitable giving. The variety of options available from The Greater Cincinnati Foundation (GCF) means you can provide flexible, customized solutions to support the causes your clients care about most.

GCF can work with you to coordinate the right giving tools and charitable funds to meet your clients' goals and to receive maximum tax benefits. Count on GCF to provide the resources to help you serve your clients better.

The right tools for giving

GCF's professional staff can assist in identifying and coordinating the appropriate tool for your clients' charitable gifts. We have extensive experience in handling:

- ☰ outright gifts
- ☰ bequests by will
- ☰ charitable gift annuities
- ☰ charitable remainder trusts
- ☰ charitable lead trusts
- ☰ life insurance
- ☰ beneficiary designations (e.g., real property, bank accounts, retirement assets or life insurance)

Choosing a charitable fund

GCF offers four types of charitable funds to allow you to meet both your clients' charitable interests and their financial needs. With these fund options, we can help implement an effective giving plan.

- ☰ Donor advised funds: for clients who want to be highly involved in where their gift goes, with the convenience and flexibility to support different charities at different times.

"GCF helps me through its support of continuing education seminars and materials to keep advisors up to date on the latest changes and happenings. You can count on the team at GCF to be thinking about ways to help us help our clients better."

– **Jeffrey E. Daniher, CFP®, CTFA, CLU**
NAPFA Registered Financial Advisor; Ritter Daniher Financial Advisory, LLC

- ☰ Restricted funds: for clients to direct a gift to a specific organization(s) or purpose for secure, long-term support.
- ☰ Field of interest funds: for clients who want to address needs in important areas of community life – such as the arts, AIDS, aging, or at-risk youth.
- ☰ Unrestricted funds: for clients who want to be able to support ever-changing community issues and trust GCF to meet those areas of critical need over the long term.

Special charitable interests

GCF has also established permanent endowments that bring together diverse donors with a common goal of enhancing the quality of life in local communities or for specific groups or populations. These funds include:

- ☰ The Clermont Community Fund of GCF supports nonprofit organizations that make a difference in that part of our region. Since 1993, grants have been awarded to more than 100 organizations and programs serving Clermont County.
- ☰ The Northern Kentucky Fund of GCF provides grants for nonprofit organizations in Boone, Campbell and Kenton counties to help support critical services. More than \$21 million in grants have been awarded since 1998.
- ☰ The Women’s Fund of GCF was created specifically to improve the quality of life for women and girls. Personal and leadership development, economic security, and social and emotional development have been supported for more than 15 years.

If your client says	Ask GCF about
“I want to be ‘hands on’ in determining where my money goes.”	Donor advised funds
“I want to be able to provide an annual gift to my church even after I’m gone.”	Restricted funds
“As a lifelong resident of Northern Kentucky, I want my contributions to stay here.”	The Northern Kentucky Fund
“Bringing arts programs to the inner city is important to me.”	Field of interest funds
“I want to be able to help the community where it needs it the most.”	Unrestricted funds

You are welcome to visit the GCF website (www.gcfndn.org) and download fact sheets on a variety of topics to share with your clients. We can also furnish copies at your request.

For nearly 50 years, GCF has been helping people achieve their charitable goals, supporting nonprofit organizations, and creating lasting good work in the region. We provide a simple, powerful, and highly personal approach to giving and offer a variety of tools to meet specific individual needs.

For more information, ideas, and details about working with GCF, contact Suzanne Rohlf, Director of Professional Advisor Relations at 513-768-6136 or rohlfss@gcfndn.org.

GIFT ACCEPTANCE POLICY

Gifts to GCF may take a variety of forms. Many are outright gifts by living donors while some are bequests or other testamentary gifts that take effect upon the donor’s death. Others may be different forms of deferred or split-interest gifts. GCF may accept the following types of assets:

- ☰ cash
- ☰ publicly-traded securities
- ☰ tangible personal property
- ☰ life insurance policies
- ☰ real property
- ☰ closely-held stock and partnership interests

GCF reserves the right to refuse any proposed gift. Further, in conformity with Treasury Department regulations governing community foundations, gifts to GCF may not be directly or indirectly subjected by a donor to any material restriction or condition that would prevent the Foundation from freely and effectively employing the transferred assets, or the income derived therefrom, in furtherance of its exempt purposes.

ONLINE RESOURCES

The Planned Giving Design Center (PGDC) is a free online resource designed for professional advisors, such as attorneys, financial planners, accountants, trust officers, private bankers, and insurance professionals. It provides up-to-date information about estate planning techniques, planned giving vehicles, a charitable gift calculator and legislative, judicial, and regulatory developments affecting charitable giving. GCF is the exclusive local host of this site available in the “Professional Advisors” section of the GCF website.



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