



The Community Foundation Edge: Personal Knowledge, QCD Eligibility, & Public Support

Advisors frequently comment that they're surprised to discover the many ways the Chester County Community Foundation can help their clients, especially compared with national donor-advised fund programs affiliated with brokerage houses or financial services firms.

Here are some examples of the types of comments the Chester County Community Foundation has heard over the years from attorneys, accountants, and financial advisors:

"The Chester County Community Foundation's donor-advised fund offering provides not only an easily accessible and flexible charitable account but, also, a personalized experience for each donor. My clients have loved getting to know other donors, accessing first-hand knowledge about what's going on in the community and how their favorite charities are making a difference, and being able to involve their children in philanthropic events and activities."

"I'm amazed at the variety of funds the Chester County Community Foundation can administer. Many of my clients have established donor-advised funds and have also augmented their philanthropic planning with a specialized fund such as a scholarship fund, designated fund, or field-of-interest fund. A big bonus for my retirement-age clients is that the IRS allows the Chester County Community Foundation to receive a Qualified Charitable Distribution from a client's IRA and place it into one of these specialized funds."

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The team at the Chester County Community Foundation is a resource and sounding board as you serve your philanthropic clients. We understand the charitable side of the equation and are happy to serve as a secondary source as you manage the primary relationship with your clients. This newsletter is provided for informational purposes only. It is not intended as legal, accounting, or financial planning advice.