

Looking Ahead: Charitable Planning Techniques on the Horizon



The Chester County Community Foundation team keeps a finger on the pulse of current events and legal developments that could impact the way you work with your charitable clients. Below are three notable items that you'll likely want to keep in mind this fall.

Election year implications

Naturally, as a financial, legal, or tax advisor, you're very interested in how the results of the November elections could impact tax laws. What you might not know, though, is how significantly an election cycle can [impact](#) nonprofits' fundraising efforts. Keep this dynamic in mind as you meet with clients who serve on nonprofit boards.

These clients will appreciate the fact that you're aware of the

challenges. They'll also be glad to know that you're happy to loop in the Community Foundation team as a resource to structure and accept complex gifts as charities double down on fundraising efforts this year.

Snapshot of giving trends

If it feels like more clients are asking about giving techniques such as crowdfunding, using appreciated stock to support charities, and setting up donor-advised funds, you are not imagining it. These [trends](#) are real! It's smart to stay up-to-date at a high level so that you're generally aware of what's going on with philanthropy. Beyond that, the only information you need is the Community Foundation's phone number. Our team is here for you! We are honored to be your first call anytime a client mentions that they'd like to launch or update a charitable giving plan. In most cases, the Community Foundation can provide tools and services that will help your client achieve their goals. In any event, we'll help you figure out a solution, whether or not we ultimately play a role.

For your calendar

If you're in search of tools to help motivate clients to move forward with financial and estate planning, be sure to note that [National Estate Planning Awareness Week](#) is coming up. October 21 - 27, 2024 is this year's designated timeframe to help the public understand the basics of estate planning and the reasons it's so important. The original House of Representatives [resolution](#) includes key points that may spark messaging ideas for your client outreach. And of course, on all things related to charitable planning, please reach out to the Chester County Community Foundation. We're happy to share best practices for encouraging clients to get serious about planning all aspects of their estates, including the legacies they'd like to leave to their favorite causes and the community they love.

For more information, contact the Chester County Community Foundation:

Jason Arbacheski, CAP – Gift Planning & Stewardship Director – jason@chescofc.org

Karen Simmons – President/CEO – karen@chescofc.org

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.