

Quiet Types: Spotting Clients Who Prefer to Give Anonymously

At the Chester County Community Foundation, we're dedicated to helping your clients achieve their charitable goals. We're honored to serve as your trusted resource for tax-efficient giving strategies, help your clients maximize their charitable impact, and support your clients as they build lasting philanthropic legacies. As you continue (or begin) conversations about charitable giving with your clients, one important question often arises: How would your clients like their giving to be acknowledged and recognized?



Based on each client's unique goals, the desired level of recognition may vary. While most donors choose to give publicly, there are many situations where donors prefer to give anonymously. As a trusted advisor, it's essential to understand how anonymous giving might factor into a particular client's overall philanthropy plan. Of course, the Community Foundation is here to help.

Keep an eye out for the following client sentiments:

"We don't want to get a ton of requests for charitable gifts. It's overwhelming and it makes us feel bad that we can't do it all."

In today's challenging economic environment, understandably, nonprofits often increase outreach efforts to ask for support. Through a donor-advised fund at the Community Foundation, your client can recommend the extent to which personal information is shared with recipient organizations. In many cases, our team can customize outgoing communications to grantee charities while also ensuring that your clients receive meaningful updates (such as thank you notes, impact reports, and success stories).

"We don't want our colleagues, friends, and even some of our family members to be able to see how much we give or where we give it."

Some clients value privacy and choose to keep their giving and financial capacity under the radar. Donor-advised and other fund information remains highly confidential. Unlike private foundations, which require public reporting, donor-advised and other types of funds at the Community Foundation can help keep donor identities, grantee identities, and fund balances private.

"We want to make a big difference, but we want to do it without drawing a lot of attention to ourselves."

For some donors, charitable giving is about honoring a loved one or building a family legacy, rather than personal recognition. These donors may want to make grants in a different name—such as a family name or in memory of someone significant. Working with the Community Foundation, whether it's through a donor-advised or other type of fund, offers your clients a great deal of flexibility in how a family's gifts will be recognized. Your clients can pick and choose which gifts they want to make public and which they want to keep anonymous. Clients can also make gifts that are publicly announced in honor of family members or using a generic foundation name.

If your clients are considering philanthropic endeavors with any of these goals in mind, the Chester County Community Foundation is here to help. We collaborate with attorneys, CPAs, and financial advisors, providing resources and support to ensure your clients can give to their favorite causes with the level of recognition and privacy they desire. We look forward to working with you!