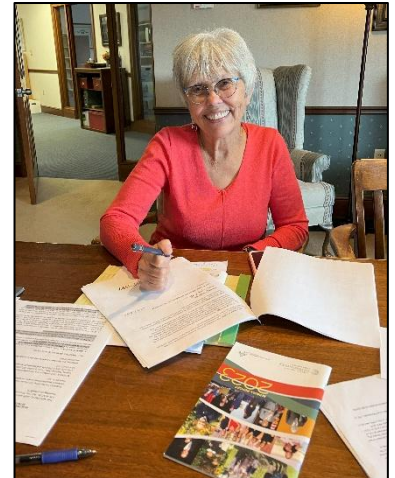


Worth a Read

The Chester County Community Foundation team keeps an eye on trends, research, legislative developments, and thought leadership at the intersection of charitable planning, estate planning, and wealth management. Here are three recent articles we think are especially relevant for attorneys, CPAs, and financial advisors serving charitable clients.

Charitable planning beats AI?

In the article "[Why Charitable Efforts Are the Advisor's Edge in an AI-Driven World](#)" appearing in *Financial Advisor Magazine*, the author suggests that charitable planning may become an increasingly significant way for advisors to differentiate themselves as artificial intelligence automates more traditional planning and investment functions. The article argues that conversations about philanthropy, legacy, and personal values create opportunities for advisors to build deeper client relationships in ways that technology cannot easily replicate, reinforcing the advisor's role as a trusted counselor rather than simply a technical expert.



Donor-advised funds continue to grow. . .

In *Financial Advisor Magazine*'s article "[Making Sense of the DAF Surge: Five Things Financial Advisors Should Know](#)," the author takes a look at the continued growth of donor-advised funds and the factors driving their popularity. Among the key takeaways are that donor-advised funds simplify charitable giving, allow donors to separate the timing of tax deductions from grantmaking decisions, and facilitate gifts of appreciated assets. The article also notes that many clients increasingly expect charitable planning to be integrated into broader wealth management conversations, making familiarity with donor-advised fund strategies an important competency for advisors.

. . .and that is good news for charities.

The article "[DAF Fundraising Report: Nonprofit Takeaways](#)" on Candid's website highlights findings showing that donor-advised fund donors are often highly engaged philanthropists who give repeatedly and frequently make larger charitable gifts over time. The report encourages nonprofits to strengthen relationships with donor-advised fund donors, improve stewardship efforts, and make it easier for donors to recommend grants through their charitable giving accounts. This article is useful to advisors because it connects the dots among donors, donor-advised funds, and nonprofit organizations.

What's the takeaway?

Remember that the Chester County Community Foundation can provide a wide range of solutions for your clients' charitable giving needs, including donor-advised funds, legacy planning, information about community needs and nonprofits, and ways to involve family members in philanthropy. We are here to support *you* as you serve your clients. Please reach out anytime.

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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.