EXPERIENCE + INNOVATION

5 ways to start the generosity conversation with your clients

Your clients depend on you for wise financial planning strategies. But what about their strategy for giving?

Talking to your clients about charitable giving is a great opportunity to deepen your relationships, grow your practice, and steward the influence God has given you. If you want to open up heart-level giving conversations with your clients, here are five simple ways you can get started:

1. Start with an easy question

Many of the advisors we work with suggest starting with this question: "What causes are you passionate about?" People from all walks of life have a deep desire to pursue their purpose. A simple question like this can shift the conversation about their financial plans in a much deeper direction.

2. Help clients open a donor-advised fund (DAF)

Show your clients the ease and intentionality of a DAF, like the NCF Giving Fund. They contribute assets, get a charitable deduction, and then can take their time to go online to decide where they would like to recommend grants. When clients have resources set aside in a DAF for giving, it's easier to have more conversations about intentional generosity.

3. Show them a wiser way to give

Don't let your clients write another check to charity when they could be gifting appreciated assets – like securities, business interests, and real estate – that may help them claim a fair market value deduction and minimize the capital gains tax. Their Giving Fund makes it easy to give appreciated assets, and NCF is recognized as an industry leader in handling these gifts.

4. Manage investments through a Separately Managed Account (SMA)

The money in your clients' Giving Fund can be invested and grow tax-free. And you may be able to maintain your role as their trusted advisor through an SMA at NCF. For fund balances over $300,000, you can offer your clients a customized approach by managing their fund's investments through an SMA.

5. Help them plan ahead for tax events

Many of the clients you serve might be planning to sell a business or property and then give the after-tax proceeds to charity. They could inadvertently miss out on the benefit derived from gifting appreciated assets prior to a sale. Did you know that they can gift a portion of the asset outright to us to maximize their tax savings? They can also gift the asset through a simple split-interest arrangement like a charitable gift annuity.

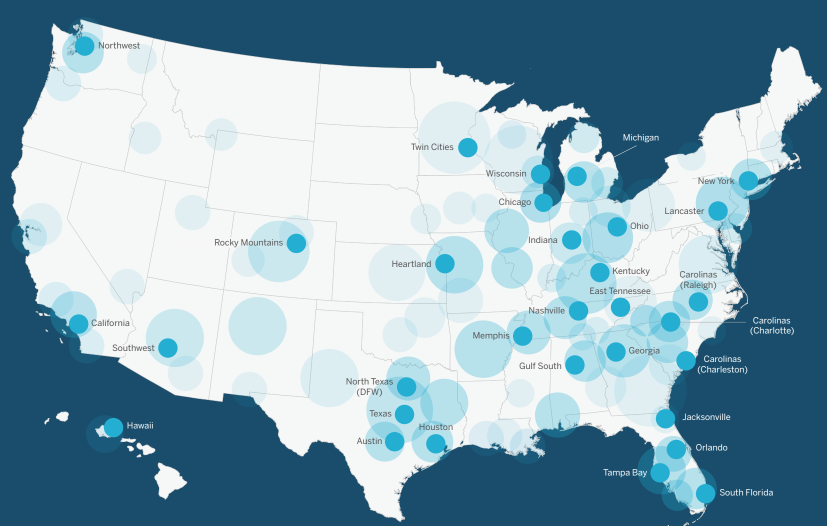
The NCF difference

Our commitment is simple: to help you make the most of every dollar, every decision, and every opportunity you have. With ministry partners, cause experts, gift planners, experienced professionals, and faithful givers, our unique role at the intersection of these charitable giving innovators ensures that you have access to a creative generosity ecosystem you won't find anywhere else.

42+	3,200+	$25B	425+
Years of sophisticated, biblically informed giving solutions	Gifts of business interests, real estate, and other complex gifts	Grants since 1982	Staff to support you and your clients

With you, wherever you are

With local teams serving in more than 180 communities nationwide, our growing network connects you to thought leaders and experts in generosity, a community of peers, and creative giving opportunities across the country.



Connect with your local NCF team today →

ncfgiving.com or (800) 681-6223