Maximize your clients' giving

An introduction to the National Christian Foundation

NCF National Christian Foundation®

ncfgiving.com

Increased giving expertise. Enhanced strategy. Stronger client relationships.

You have a profound opportunity to help your clients navigate one of the most influential areas of their lives: charitable giving. Beyond securing a tax deduction, Christian givers want to be strategic and faithful stewards as they give from the resources God has entrusted to them. So, as they integrate their faith and finances, they need the right tools and an approach that incorporates their vision, passions, relationships, and areas of influence.

For more than four decades, the National Christian Foundation (NCF) has come alongside advisors as they guide Christian clients through the complexities of faithful, tax-smart giving. Our technical and biblical depth, expansive network, and creative giving solutions equip you to deliver even more value to your clients – helping them make the most of their giving. We're here to help you turn generous dreams into powerful realities.

Advisors we serve

NCF helps a diverse community of advisors who are navigating generosity in client conversations about topics ranging from business giving and charitable investing to family philanthropy and legacy planning.

Financial advisors

As you provide guidance on financial strategies, you can integrate charitable giving strategies to meet your clients' stewardship goals with tax-wise strategies.

Family offices

While you're managing the financial affairs of multigenerational families, you can cultivate unity across generations and unlock more giving.

Attorneys

As you design tax-efficient estate and business succession plans, you can identify creative strategies to meet your clients' giving goals, potentially providing favorable tax outcomes.

CPAs

As you provide essential services, like tax planning, auditing, or financial advising, you can find efficient ways for your clients to give more while potentially reducing tax liabilities.

Mergers & acquisitions professionals

When guiding business owners through transition planning and the complexities of capital markets, you can determine pre-sale giving strategies, aligning business and stewardship goals.

Insurance agents

As you advise clients on risk management and asset protection, explore opportunities to give strategically from insurance policies for more generosity and tax efficiency.

"Plans fail for lack of counsel, but with many counselors they succeed." – Proverbs 15:22

$25B+

to 100,000+ charities

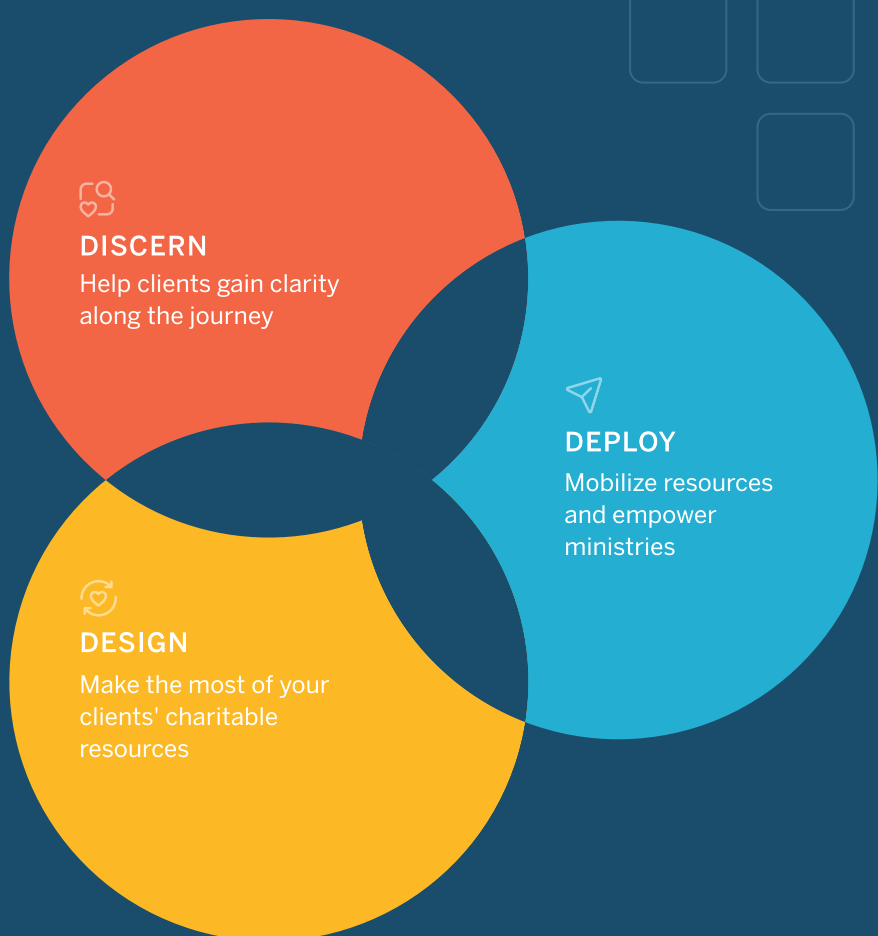
NCF BY THE NUMBERS

$6B+
value of complex asset gifts since 1982

3,200+
gifts of business interests, real estate, and other complex assets

180+
generous communities served by NCF

Serve clients anywhere along the giving journey



A full suite of tools

Biblical generosity – the kind that leads to life change and authentic joy – is not a one-size-fits-all pursuit. Families are diverse, businesses are structured with nuance, and convictions are deeply personal. To account for these differences, the giving journey involves discerning your clients' priorities and God's direction, designing a plan tailored to their unique capacity and aspirations, and deploying those resources over a lifetime. Our innovative and biblically informed strategies that span this entire landscape allow us to customize solutions for any giving need your clients have.

DISCERN

Spiritual growth

- Generosity discipleship
- Giver stories
- Mentorship opportunities
- Prayer & encouragement
- Local support

Gatherings & events

- Small groups
- Retreats & conferences
- Local & national events
- Peer-to-peer gatherings

Family stewardship

- Family giving strategy
- Family meeting support
- Family-to-family connections

Giving Strategy™

- Mission & purpose
- Values alignment
- Giving passions discernment
- Wealth & resources exploration

DESIGN

Cash & stock giving

- Cash strategies
- Publicly traded securities

Asset giving

- Strategic asset exploration
- Gift planning & execution support for assets, like real estate, business interests, and private investments
- Variety of liquidation pathways

Charitable investments

- Core investment pools
- Alternative investments
- Separately Managed Accounts (SMAs)

Charitable legacy

- Charitable estate planning
- Testamentary giving
- Giving Fund succession
- Charitable Gift Annuity (CGA)

DEPLOY

Generous communities

- 180+ local communities
- Generosity councils
- Volunteering & board connections
- Events & experiences
- Cause education

Grantmaking vehicles

- Giving Fund (DAF)
- Single-Charity Fund
- Designated Fund
- Supporting Organization (SO)

Collaborative giving

- Giving circles
- Impact alliances

Grant deployment

- Extensive charity database
- Charity review
- ACH transfer
- International grantmaking*
- Philanthropic consulting*

*In collaboration with strategic partners of NCF

Sophisticated tools and personalized support

Integrating faith and finance is complex, but it's more than possible. With genuine care, our team draws on decades of industry experience to equip you with insights and best practices.

We design our resources to be relevant, practical, and well-informed so you can help your clients make the most of all God has entrusted to them. From group experiences to technical tools, below are some of NCF's most popular resources for advisors.

Gift illustrations

Understand the gift economics on a potential asset gift.

Technical collaboration

Collaborate about client strategies with us as a sounding board in personal consults.

Strategic fund reviews

Optimize your clients' future giving by seeing and sharing the impact of their past generosity.

Inside Giving™

Grow your technical expertise while gaining continuing education (CE) credits through our webinars, events, and educational opportunities.

Giving Strategy

Help families align and create a Giving Strategy based on biblical principles.

Generosity resources

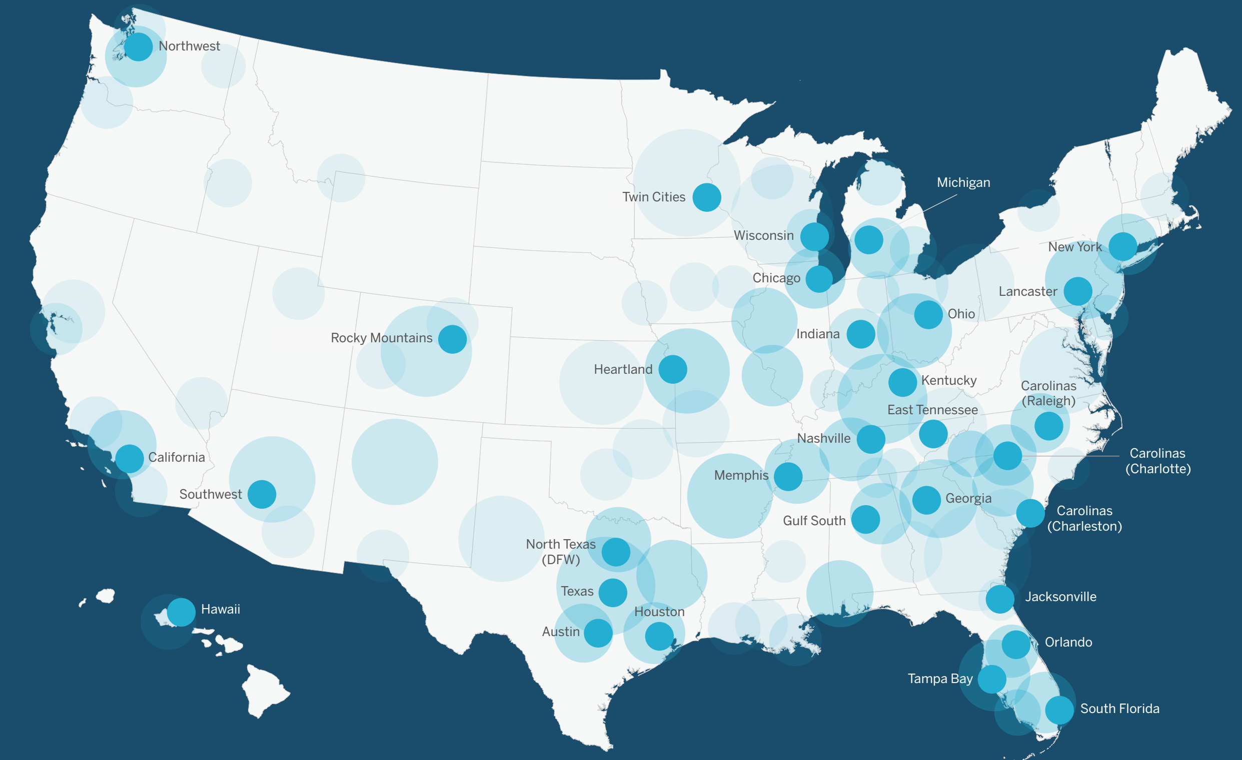
Access a curated collection of videos, books, articles, studies, podcasts, and experiences to inspire you or your clients on the giving journey.

Local presence with global reach

NCF serves as a bridge that connects advisors and their clients to a global generosity ecosystem. We work diligently to ensure you and your clients have all you need to streamline giving and maximize charitable gifts.

With local teams in 30+ offices serving in more than 180 communities nationwide, our growing network connects peers, shares insights, and mobilizes generosity across the country and around the globe.

The ecosystem expands beyond us to include charitable giving innovators, cause experts, and charities – all committed to meaningful outcomes and life transformation. Wherever you are, if there is a question or a challenge, we can find a solution.



180+
communities nationwide

425+
local and national staff to support you

Find a local team at ncfgiving.com/teams →

NCF

With you and for you

Since 1982, NCF has helped mobilize more than $25B in giver-recommended grants to 100,000+ charities. Advisors play an important role in that impact. As you work with your clients to achieve their giving goals, our experience, knowledge, and network of support can help you serve them well.

Let's start a conversation

Whether you’re working on a specific client strategy, interested in growing your knowledge of charitable giving options, or intrigued by integrating faith and finances, our team is ready to help.

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