

Talking to Your Clients

Ten questions to ask your clients to help them accomplish their financial, charitable and lifetime goals.

1 Beyond family and business, what is most important to you?
What things in the world would you like to change or preserve?

2 What charitable organizations do you currently contribute to?
What principles have guided your charitable giving so far?

3 Do you want to teach your children to give in the same manner
as you? How wealthy do you want your children to be?

4 Have you talked as a family about important values and
philanthropic goals?

5 Would you be more generous to the organizations you love,
lead and support if you could do that without adversely
affecting other personal goals?

6 Have you considered what would happen to your assets if your
spouse or children do not survive you? Would you like any of
your assets passed on to a charity?

7 What would you like your personal and/or family philanthropic
legacy to be?

8 Do you wish to use your financial or estate plan to give back
to the community?

9 Whom do you want to inherit your assets - Family? Government?
Charity? Is reducing taxes a goal in your estate planning?

10 Are there time-sensitive tax considerations influencing your
giving decisions?

WHY BCF?

Every fund created at the Baltimore Community Foundation is unique, but in general, philanthropic funds are described as one of the following types:

- Funds for Baltimore
- Field of Interest Funds
- Designated Funds
- Donor-Advised Funds
- Organizational Endowments
- Scholarship Funds

Estate planning tools such as charitable gift annuities, charitable remainder trusts and bequests can be used to establish or add to existing funds.

Most types of funds may be established for a minimum opening gift of \$10,000.

For a confidential consultation, contact:

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