

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:

Rosemary Calderalo
Director of Gift Planning
 410-332-4172 ext.132
 rcalderalo@bcf.org



Board of Trustees

OFFICERS

<i>Chair</i> Laura L. Gamble PNC Bank	<i>Vice Chair, Treasurer</i> Tedd M. Alexander III T. Rowe Price Associates	<i>Vice Chair</i> Josh E. Fidler Chesapeake Realty Partners	<i>Secretary</i> Marsha Y. Reeves KIPP Baltimore	<i>President & CEO</i> Shanaysha M. Sauls Baltimore Community Foundation
--	--	--	---	---

TRUSTEES

Lillian Bauder Cranbrook Educational Community	Thomas S. Bozzuto The Bozzuto Group	Ronald J. Daniels Johns Hopkins University	Lisa Hamilton Annie E. Casey Foundation	Kurt L. Schmoke University of Baltimore
Patricia P. Baum RBC Wealth Management, Baum Jackson Investment Group	Calvin G. Butler Jr. Baltimore Gas & Electric	Mark R. Fetting Camp Brightside Foundation	Patricia H. Joseph The Shelter Foundation	Kenneth L. Thompson Venable, LLP
Diane Bell-McKoy Associated Black Charities	Audrey J. S. Carrion Circuit Court for Baltimore City	Guy E. Flynn DLA Piper	Wes Moore Robin Hood	Paul C. Wolman WolmanEdge
Ellen N. Bernard Community Leader	David S. Clapp Rowland Ventures	Matthew D. Gallagher Goldseker Foundation	Barbara A. Mikulski U.S. Senator (Ret.) Johns Hopkins University	Steven G. Ziger Ziger/Snead LLP

HONORARY TRUSTEES

William C. Baker Chesapeake Bay Foundation	Sandra Levi Gerstung The Hecht-Levi Foundation, Inc.	Harry S. Johnson Whiteford, Taylor & Preston, LLP	Lenel Srochi-Meyerhoff Community Leader
Constance R. Caplan Caplan Family Foundation, Inc.	Wilson T. Gildee Kids-R-VIPs Foundation	Susan B. Katzenberg Goldseker Foundation	Marc B. Terrill The Associated: Jewish Community Federation of Baltimore
Juliet A. Eurich Alvin & Fanny B. Thalheimer Foundation, Inc.	Michael D. Hankin Brown Advisory	Arnold I. Richman The Shelter Group	Calman J. Zamoiski Jr. Independent Distributors, Inc.
Mychelle Y. Farmer Jhpiego	Freeman A. Hrabowski III University of Maryland, Baltimore County	Theo C. Rodgers A&R Development Corporation	
Redmond C. S. Finney Community Leader	Stephon A. Jackson T. Rowe Price Associates	Pam Shriver PHS, Ltd.	

TRUSTEES EMERITI

Raymond L. Bank Raymond L. Bank & Associates	George L. Bunting Jr. Blue Jar Private Trust Company	Edward K. Dunn Jr. Sheldon Goldseker Goldseker Foundation	E. Robert Kent Jr. Alex. Brown Realty, Inc.
Eddie C. Brown Brown Capital Management, Inc.	Suzanne F. Cohen Nathan and Suzanne Cohen Foundation, Inc.		Walter D. Pinkard Jr. Cushman & Wakefield

FORMER BOARD

James C. Alban III	J. Owen Cole ✕	David Hirschhorn ✕	Joseph Meyerhoff ✕	Jacques T. Schlenger ✕
James C. Alban IV	William Cowie	Alan P. Hoblitzell Jr.	Sally S. Miller ✕	Benjamin Shaw
H. Furlong Baldwin	Michael E. Cryor	LeRoy E. Hoffberger ✕	Judy Jolley Mohraz	Stuart O. Simms
Carlyle Barton Jr. ✕	Owen Daly II ✕	Mary Ellen Imboden ✕	Ioanna T. Morfessis	Robert Sherwood ✕
Richard O. Berndt	Alonzo G. Decker Jr. ✕	William L. Jews	Jack Moseley ✕	Bernard C. Trueschler
H. Lee Boatwright III	Donald L. DeVries * ✕	James C. Johnson	Douglas W. Nelson	William F. Ward Jr.
H.J. Bremermann * ✕	Tilton H. Dobbin ✕	Herbert M. Katzenberg ✕	John M. Nelson III ✕	David L. Warnock
Andre W. Brewster ✕	H. Louis French ✕	Edward J. Kelly III	Walton D. Pearson	Donn Weinberg
Thomas H. Broader Jr. ✕	Walter Gray *	W. Wallace Lanahan Jr. ✕	J. Stevenson Peck ✕	Robin Williams Wood
William R. Brody	Jack S. Griswold	Robert H. Levi * ✕	Michael P. Pinto ✕	Bruce P. Wilson * ✕
Deborah Winston Callard	Vicki Gumtow	Earl L. Linehan	Margaret K. Riehl	Jay Wilson
Benjamin S. Carson Sr.	Carla D. Hayden	Maria Welch Martinez	Bishop L. Robinson ✕	
Richard W. Cass	Ellen M. Heller	Adrian L. McCardell Jr. ✕	James W. Rouse ✕	
Louis R. Cestello	Sandra D. Hess	Patrick McCarthy	Timothy C. Scheve	

* Served as board chair ✕ Deceased



2 East Read Street, 9th Floor, Baltimore, MD 21202 · 410.332.4171 · Fax 410.837.4701

WWW.BCF.ORG

BCF is a 501(c)(3) tax-exempt, publicly supported organization; contributions are fully deductible to the extent permitted by law. A copy of our current financial statement is available at www.bcf.org. Documents and information submitted to the State of Maryland under the Maryland Charitable Solicitations Act are available from the Office of the Secretary of State for the cost of copying and postage.

rev. 6/11/2018