

Advisor Toolkit

*Helping You Help Your Clients Give
with Purpose*



Let's Do Some Good Today!

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Welcome

Thank you for the important role you play in helping your clients align their values with their financial and estate planning goals. At Central Kentucky Community Foundation, we are honored to partner with advisors like you to offer flexible, strategic charitable giving solutions that create lasting impact.

This toolkit is designed to support your conversations about philanthropy, provide helpful tools and sample language, and demonstrate how CKCF can enhance the services you already offer.

We look forward to working together to help your clients give wisely, meaningfully, and with confidence.

Warm regards,

Davette Swiney, President/CEO
Central Kentucky Community Foundation

Why Partner with CKCF?

Benefits for you

- Extend your services with charitable planning expertise.
- Strengthen client relationships through values-based conversations.
- Rely on our knowledge of local needs and qualified nonprofits.
- Maintain your role - you continue managing your clients assets, if desired.

When to Refer Clients to CKCF

- Looking for an easy, impactful way to enhance our community
- Selling a business or experiencing a significant financial event
- Considering an estate plan or updating a will
- Unsure of how to best direct their charitable dollars
- Wanting to engage the next generation in giving

Benefits for your Clients

- Flexible giving options - now and through their estate.
- Personalized service and custom charitable plans.
- Tax advantages including gifts of appreciated assets, closely held stock, and more.
- Connection to impact - locally and beyond.

How We Support You

- Provide sample language for wills, trusts, and fund agreements
- Host joint client meetings, if requested
- Offer confidential illustrations of gift and tax outcomes
- Stay current on tax laws and philanthropy trends
- Respect your client relationships

Charitable Fund Options

Fund Type	Best For	Features
Donor Advised Funds	Clients who want to say involved in grantmaking	Flexible, responsive, often an alternative to private foundations
Scholarship Funds	Clients passionate about education	Customized criteria and community impact
Designated Funds	Clients with favorite nonprofits they want to support long-term	Reliable income stream for nonprofits
Field-of-Interest Funds	Clients who care about a cause, not a specific organization	Community foundation directs grants within chosen issue area
Unrestricted Fund	Clients who want to support broad community needs	Allows the foundation to respond to the most pressing future needs
Agency Fund	Nonprofits who want to build sustainability	Investment growth and professional fund administration

Gift Types

Outright Gifts

- Cash
- Stocks
- Real Estate
- Retirement Assets

Planned Gifts

- Bequests
- Charitable Trusts
- Beneficiary Designations

Complex Gifts

- Closely held business interests
- Farmland
- Life Insurance

Conversation Starters

- ***Have you thought about how your financial legacy could support causes that matter most to you and your family?***
 - This opens the door to values-based planning and introduces philanthropy as part of the client's overall financial goals.
- ***Are there any local organizations or community needs you care deeply about that we could help support through your estate or annual giving?***
 - This personalizes the conversation and helps connect clients emotionally to their giving potential.
- ***Would you be interested in learning how a donor advised fund or other charitable vehicles through CKCF could offer tax benefits while supporting your favorite causes?***
 - This introduces a strategic option that blends generosity with financial planning advantages.
- ***Have you considered how charitable giving might help involve your children or grandchildren in your financial and community values?***
 - This encourages multi-generational engagement and positions philanthropy as a family legacy tool.
- ***Did you know CKCF can help you make a long-term impact locally, even if you're not sure exactly which nonprofit to support today?***
 - This helps clients see that they can start giving now without needing all the answers up front.

Contact & Resources

We would love to work with you!

We invite you to contact us for a confidential consultation or to explore how we can support your clients goals.

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