

AT A GLANCE

» **1977**

Year Founded

» **1,265**

Number of funds

» **\$250 million**

Total assets

» **50%**

Assets endowed for
Austin's future

» **\$30 million**

Total grants awarded in
2018

» **379**

Students receive
\$633,500
in scholarships annually

» **A variety of investment options** for your clients' giving goals, including retaining current

How We Can Help You

Whether you are an attorney, financial planner, or tax advisor, the Austin Community Foundation can assist you and your clients structure tax-wise gifts that carry out their wishes to create an enduring legacy. We add our expertise to yours to ensure that your client makes educated decisions while selecting from a full range of options.

For most of your clients, philanthropy is an important part of their lives—they may give to their alma mater, faith community and to local, national and even international charities. Many may also value volunteering in our community in hands-on roles or as board members. But when they meet with you, they are primarily focused on gaining your expertise to protect and extend their assets and you are focused on providing that. What if you could help your clients set philanthropic goals while still protecting their assets?

We can help you and your clients structure tax-wise gifts that carry out their wishes to create an enduring legacy.

- Our status as a public charity provides maximum tax advantages under federal law.
- We accept a wide variety of assets that not all charities can.
- We can facilitate simple or complex forms of giving.
- Our fee is more affordable than the costs of a private foundation.
- Our flexible and highly personal giving solutions strengthen your client relationships.

There are many advantages to partnering with us and in most cases our annual fee is more affordable than the costs of a private foundation. One fee covers all of our services.

We can help with:

- Donor advised funds
- Knowledge of local charitable giving opportunities
- Bequests
- Endowments
- Year-end tax planning
- Gifts of highly appreciated stock
- Substantial retirement fund assets
- Sale of a business
- Leaving a legacy
- Family foundation alternative
- Scholarships
- Memorializing a loved one

Let us help you protect and extend your clients' assets throughout their lifetime, and then ensure that long after their death their charitable distributions are made according to their wishes.

» Learn more: www.austincf.org/AttorneysAdvisors

» Download documents and scenarios specially designed to help you and your clients: www.austincf.org/AttorneysAdvisors