

# Solutions for Your Clients

## How we can help you

Whether you are an attorney, financial planner, or tax advisor, 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 their 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.

- / As a place-based foundation, we can provide your clients with local expertise in Austin's philanthropic landscape
- / Gain access to our long-term investment pools, with the option to retain asset management for accounts larger than \$500,000
- / Our status as a public charity provides maximum tax advantages under federal law
- / We accept a wide variety of assets that other charities cannot
- / We can facilitate simple or complex forms of giving
- / 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

## ACF AT A GLANCE

**1977**  
YEAR FOUNDED

**+1,300**  
FUNDS

**\$571 MM**  
GRANTS AWARDED  
SINCE 1977

**\$538 MM**  
ASSETS

**38%**  
ENDOWED FOR THE FUTURE

## Get started

Partner with ACF to help support your clients' charitable giving goals now and in the future.

## Learn more on our website:

[austincf.org/give-advise/  
attorneys-and-advisors](https://austincf.org/give-advise/attorneys-and-advisors)

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