



# PROFESSIONAL ADVISORS

**Established in 1998 the Community Foundation in Wales work with clients and partners, giving independent philanthropic support and advice tailored, helping them to realise their personal charitable ambitions. We pride ourselves on giving a professional, cause-neutral and bespoke service.**

We are increasingly finding that individuals and businesses are looking to discuss charitable giving with professional advisors as part of their financial planning. They want to give back to their communities, to causes close to their heart, but don't necessarily know how to go about it. Furthermore, people want their charitable giving, like any other form of investment, to yield more than just a satisfactory return and are increasingly turning to their professional advisors for specialist support and advice.

This is where we can help – we offer a personal, professional and cost effective service ensuring that giving charitably is a rewarding and enjoyable experience. We can help in the philanthropic discussions you have with your clients, combining our expertise with yours, ensuring your client is given the right information to make the right decisions. Whether your client is looking to establish a named fund through a donation, leave a legacy through a gift in their will or transfer an existing trust, we can work with you and your client to find a solution that suits.

## Benefits to you and your client:

### 1. Flexible

An alternative to setting up a charitable trust which can prove complicated to set up and administer. We deal with all legal and regulatory requirements, fund administration, investment management and grant assessments.

### 2. Swift

Funds can be set up in a one hour meeting.

### 3. Personalised

Clients receive a personalised philanthropy advice service where they can tailor their giving as they see fit.

### 4. Tailored

Clients can be as engaged as they wish. We provide an arms-length or fully engaging service and everything in between.

### 5. Private

We can ensure anonymity if required. The fund and its grants can be set up and given anonymously.

### 6. Bespoke

A fund can be targeted to a specific cause or geographical area, or both.

### 7. Tax efficient

The Foundation is a registered charity, enabling clients take advantage of tax breaks, such as gift aid.

Our endowment stands at £11 million and our clients include individuals, families, businesses as well as other Charitable Trusts and Foundations. Our partners and clients work with us because they value our philanthropy services in stewarding their charitable giving, administering and monitoring grants, maximising their impact and demonstrating a sustainable legacy.