



Charitable Giving for Your Clients

Why professional advisors partner with the Wichita Foundation

- Process is simple – a two-page document establishes your client’s fund
- Staff understands nonprofit landscape and can provide insight to clients
- We ensure your client’s charitable intent is followed, even after death, and if nonprofit status changes



A smart alternative to a private foundation

- Lower cost
- Greater flexibility – no administrative burden
- Gifts are more private
- More immediacy, simple and quick to open
- No annual distribution requirements (private foundations require 5%)

How can WF maximize your client’s giving?

- ▶ **Immediate tax deductions** for charitable contribution with flexible timing of actual giving
- ▶ **Tax avoidance strategy** when making gifts to WF
- ▶ **Assist on estate planning** discussions with charitable intent
- ▶ **Gift to any legal nonprofit** in the U.S. and foreign agencies
- ▶ **Many assets are accepted** such as cash, publicly-traded stock, privately-held stock, land, life insurance and more
- ▶ **Endowed or non-endowed** fund options (4% spending policy)
- ▶ **Private foundation grants** to a WF fund will satisfy annual distribution requirements
- ▶ **Client receives one tax receipt**, simplifying paperwork at tax time

Charitable Giving for Your Clients

You have your client's best interest at heart – so do we

You've helped them build their business, provide for their family and grow their assets. They rely on you for advice. They want you to offer options and suggest solutions, including times when charitable giving may be right.

By working together, we can offer your client solutions they may not have known were possible. Examples of clients we can help serve include:



The couple or individual ready to explore **estate planning**



The philanthropist seeking to leverage insurance policies for **legacy gifts**



The person who found financial success and is **philanthropically motivated**



The entrepreneur who sold a business and requires a **tax solution**

Charitable Investment Partner funds

Managed by wealth manager

- Fund minimum of \$250,000 to \$500,000; specific total dependent on long-term plan
- Client gifts funds to WF, WF opens account with wealth manager
- Client's trusted wealth manager manages investment portfolio
- WF manages charitable distributions from fund; no investment fees charged by WF

Fee structure

Investment Fee

- Charged by investment advisor or wealth manager

Support Fee

- Fees charged by WF to administer the fund
- No additional investment fees charged when managed by professional advisor
- Tiered structure based on fund balance



Example

Fund size	Fee %	Annual Fee
\$250,000	1.60%	\$4,000
\$500,000	1.30%	\$6,500
\$1,000,000	1.15%	\$11,500

Ready to refer a client?

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