Trusted collaboration to help clients
give well, locally, and lastingly.

Community Foundation OF SOUTHWEST INDIANA

The Community Foundation views attorneys, CPAs, financial planners, investment managers, insurance professionals, and other trusted advisors as essential collaborators in clients' charitable planning.

Our Role as Your Trusted Partner

We aim to support you in serving clients, bringing philanthropic expertise, flexible charitable tools, and local impact knowledge.

What We Bring to the Table

Feature	Benefit to You	Benefit to Clients
Investment Partnerships	You keep managing your clients' assets while they also establish a charitable fund.	Clients gain philanthropic capacity without giving up control or convenience.
Flexible Giving Options	We implement giving vehicles that integrate with estate plans or business succession strategies.	Donor flexibility (bequests, endowed funds, donor advised funds, etc.)
Local Insight & Networks	We bring regional relationships, data, and grantmaking knowledge.	More efficient giving. Clients' gifts are better matched to high-impact local causes.
Operational & Compliance Support	We handle administration, reporting, compliance, gift acceptance, due diligence, and ongoing fund management.	Clients avoid burdens of record-keeping, oversight, audits, etc.
Reputation & Standards	We are National Standards–accredited, accountable, and transparent.	Clients' charitable funds rest on a foundation of trust and best practices.

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Key Messages You Can Use with Clients

- "Better than a private foundation" — We offer many of the tax, legacy, and control advantages of a foundation without the administrative burden.
- "Locally grounded" — We are deeply rooted in this region and work to ensure gifts align with meaningful community impact.
- "Flexible and enduring" — Clients can direct gifts over time, name successor advisors, change grant recommendations, and adapt their giving over decades.
- "Your relationship is central" — We don't replace the advisor; we enhance your offering and deepen the value you bring to clients.

How the Collaboration Works in Practice

1. **Introduce charitable giving early**
   - At estate-planning conversations, ask whether clients have philanthropic goals or legacy intentions.
   - Offer the Foundation as a resource, not as competition.
2. **Design the right tool**
   - Donor advised funds, endowed funds, bequests, charitable remainder trusts, etc.
   - We help model tax outcomes, payout flexibility, and impact scenarios.
3. **Structure with efficiency**
   - Accept many asset types, including non-cash assets.
   - Perform gift processing, legal checks, valuation, and compliance.
4. **Ongoing service**
   - Deliver fund statements, grant tracking, and donor impact reporting.
   - Conduct periodic strategy check-ins with you and the client.
5. **Legacy handoff**
   - Enable successor advisors to step in.
   - Clients may name charities, fields of interest, or grant guidelines for long term.

Common Advisor FAQs

- Will I lose control over investments?
  - Not necessarily. In many cases, you can continue managing investments while we handle the charitable side.
- Is this more expensive than a private foundation?
  - No. Our structure minimizes overhead, compliance burden, and administrative cost compared to running a private foundation.
- What types of gifts can clients make?
  - Cash, stocks, real property, non-cash assets, bequests, etc. We help with due diligence, valuation, and risk mitigation.
- How local is our reach?
  - We operate through an alliance of nine county-level affiliates in southwestern Indiana.
- How is the Foundation held accountable?
  - Accredited under National Standards, transparent in operations and audits.