PROFESSIONAL ADVISORS

CUSTOMIZED CHARITABLE SOLUTIONS

You know your clients. We know philanthropy.

For more than 45 years, we have worked with a large network of estate planning attorneys, wealth advisors, accountants, real estate agents and other estate planners to help clients accomplish their financial planning objectives and charitable giving goals, while maximizing their tax deductions.

From establishing donor-advised funds to building your client's legacy and providing them with grantmaking guidance, our experienced Giving Team is your ideal partner to build customized charitable solutions that match your clients' needs.

YOUR CHARITABLE PARTNER

San Diegans turn to their trusted professional advisors when first considering philanthropy.

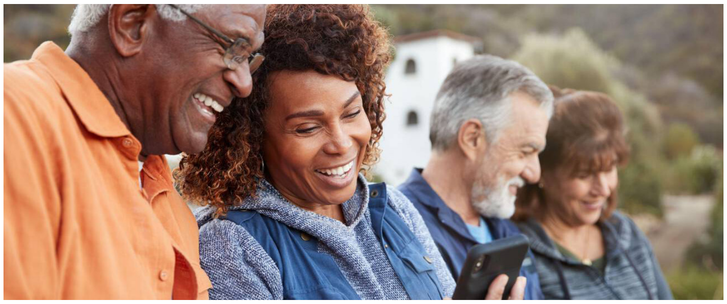
We act as the charitable partner/advisor of your professional team, supporting your clients through the giving process as you retain complete control of your client relationships.

We can help:

- Identify your clients' charitable giving interests and goals
- Implement charitable gifts that maximize tax benefits for income, capital gains and estate
- Create lifetime and legacy giving plans for businesses, families and individuals
- Facilitate multi-generational giving for families
- Research community needs and the most impactful ways to give
- Support your clients charitable giving while you maintain management of their assets
- Simplify legal complexities, administrative burdens and IRS compliance requirements
- Connect you with industry thought leaders and promote your expertise
- Provide sophisticated investment options to grow your clients' charitable giving

"My clients and I work with San Diego Foundation giving advisors to realize estate planning goals, which often include using sophisticated trusts to increase charitable impact and maximize tax deductions."

—Laura L. Nichols, Certified Specialist in Estate Planning, Trust & Probate Law, Buchalter Law Offices



ASSETS WE ACCEPT

We accept cash, non-cash and complex assets for lifetime and legacy giving. Donating assets helps lessen the tax implications for appreciated assets or liquidity events.

Traditional assets we accept include:

- Cash
- Stocks
- Bonds
- Mutual Funds
- Retirement Plans
- Life Insurance

Complex assets we accept include:

- Private Stock
- Real Estate
- Business Interests (including partnerships and interests in LLCs)

INVESTING FOR GOOD

Our financial statements and investment history ensure you can trust our long-term fiscal stewardship of your clients' charitable gifts.

Under the oversight of our Board of Governors Investment Committee and Chief Investment Officer, we invest donor-advised funds in a diverse, carefully-defined set of asset classes to mitigate risk and provide sustainable growth.

Alternatively, you can consider our AMPlify (Asset Management Partnership) program, a customized investment strategy that enables wealth advisors and their clients to set up charitable accounts at The Foundation that are managed personally by you.

Our Giving Team will work with you to identify which of our investment portfolios and accompanying fees meet your clients' charitable goals.

HOW THE SAN DIEGO FOUNDATION CAN HELP

Since 1975, The San Diego Foundation has helped passionate, socially minded citizens find ways to create positive impacts in communities across San Diego.

Interested in learning how donor-advised funds can meet your clients' financial planning and charitable giving goals? Contact our charitable giving experts.

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Visit SDFoundation.org/Advisor to learn more