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STRATEGIC ENGAGEMENT WITH WEALTH ADVISORS

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ROSE COMMUNITY FOUNDATION

STRATEGIC ENGAGEMENT WITH WEALTH ADVISORS

Today's Agenda:

- Welcome and introductions
- Values exercise
- Examples of engagement
- Values tool
- Unique demographic and tax environment
- Barriers and challenges
- Next steps and Takeaways

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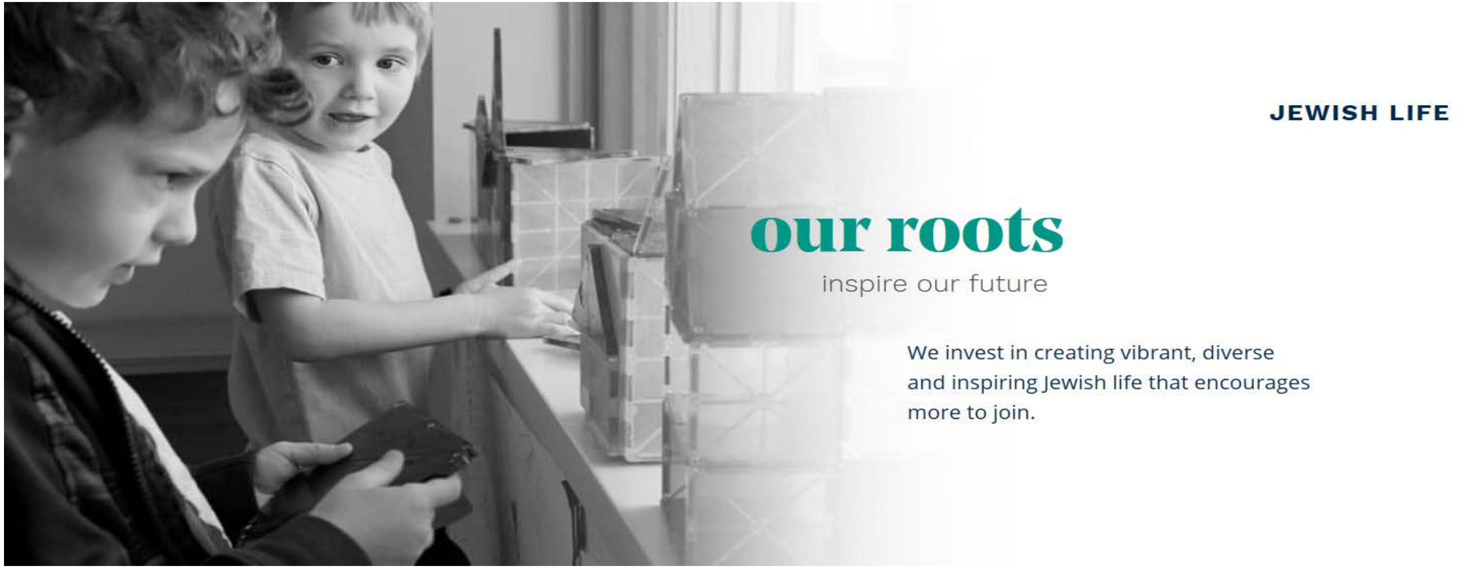
Rose Community Foundation

Enhancing the quality of life

Rose Community Foundation

Jewish Life Priority Areas



Live On: Build Your Jewish Legacy

Launched in 2005

LIVE ON

BUILD YOUR JEWISH LEGACY

An initiative of ROSE COMMUNITY FOUNDATION

ROSE COMMUNITY FOUNDATION

How we work with donors and support their advisors

- Donor-Advised Fund Management
- Access to expertise on community issues
- Due diligence on nonprofits
- Stewardship of charitable legacy gifts
- Facilitated conversations on values and philanthropy

ROSE COMMUNITY FOUNDATION'S *VALUES GUIDE*

With one or two other people, share…

1. What is the object/photograph/document?
2. What value does it represent to you?
3. How is this value evident in your life?

OR

How would you like this value to be evident in your life?

SHARING

1. **What was it like trying to find the item you wanted to bring today?**

2. **What was it like to have these conversations?**

3. **Any takeaways about how this kind of exercise could be adapted for your work with donors or clients?**

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CASE STUDY: EVENT AT BOULDER JCC FOR PROFESSIONAL ADVISORS

you're invited

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Join Rose Community Foundation in Boulder for a professional advisor networking lunch.

Leave inspired with a tool that will help you guide charitable legacy conversations with your clients.

Discover how donor passion and values-based gift planning built the new Boulder JCC and propelled the growth of its endowment.

LIVING LEGACY TAPESTRY

By Lynn Bregman Blass and Leah Sobsey
Visualhistorycollaborative.com

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Survey Feedback

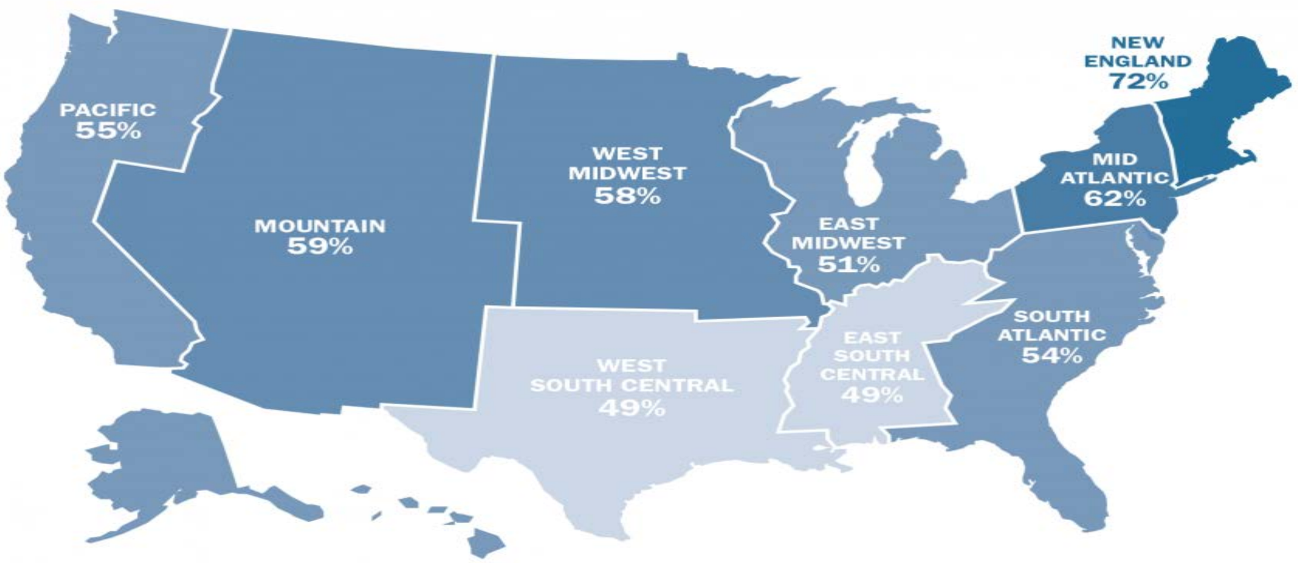
I think the values guide was a helpful way to distill what's really important to me, and I do plan to use it to kick off estate planning meetings, regardless of whether clients are philanthropically inclined. I think that it helps avoid a purely transactional meeting where the parties are still strangers, even after talking about actual life-and-death issues.

NOW IS THE TIME TO PARTNER WITH WEALTH ADVISORS

Largest Intergenerational wealth transfer

DEMOGRAPHIC ANALYSIS OF GIVING

Share of Americans who give to charity is falling



66.2% in 2000

55.5% in 2014

2017 Study by Indiana University Lilly Family School of Philanthropy

CONSEQUENCES OF DOUBLING THE STANDARD DEDUCTION

Nonprofit Anxiety

Gifts will come from fewer and richer givers

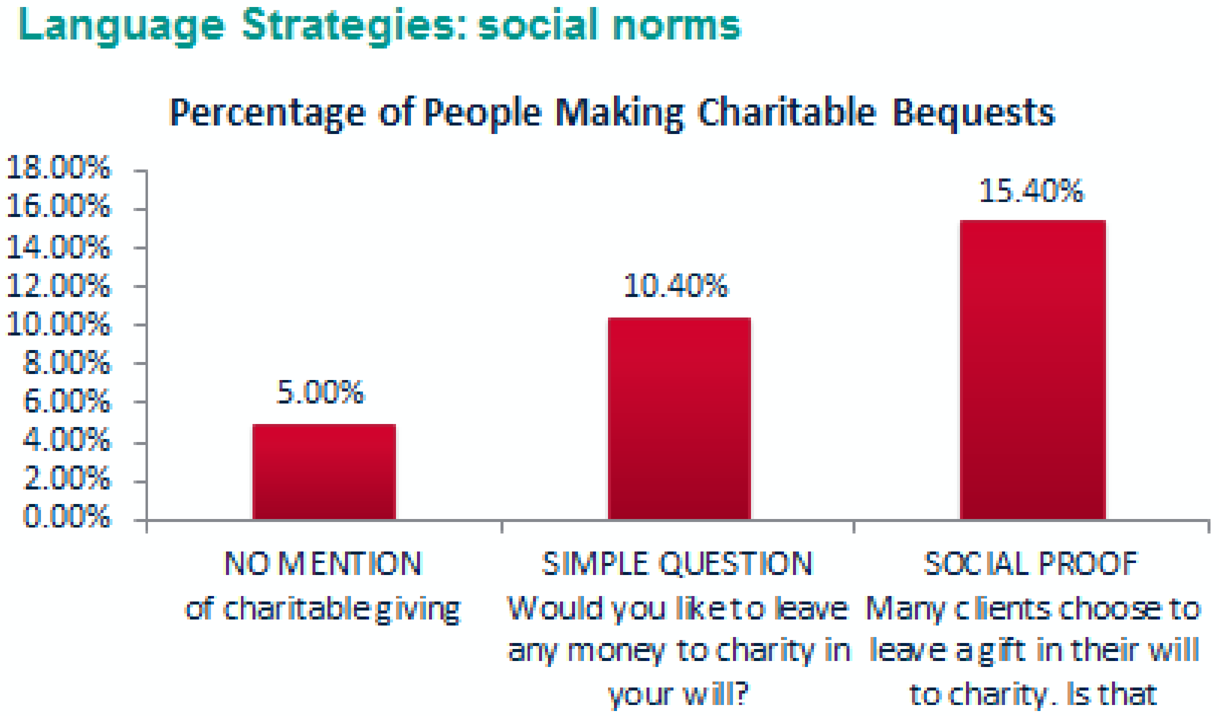
DEMOGRAPHIC AND TAX CHANGES ALSO CREATE AN OPPORTUNITY FOR GENEROSITY

DONOR
ADVISED
FUNDS

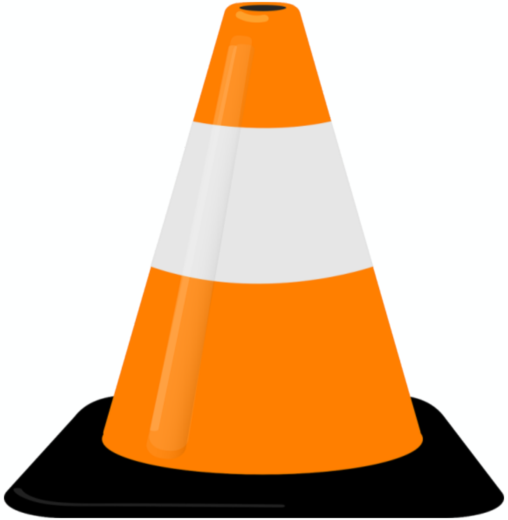
PLANNED
GIFTS OF
APPRECIATED ASSETS

HOW CAN WE HELP THE ADVISORS ENCOURAGE GENEROSITY?

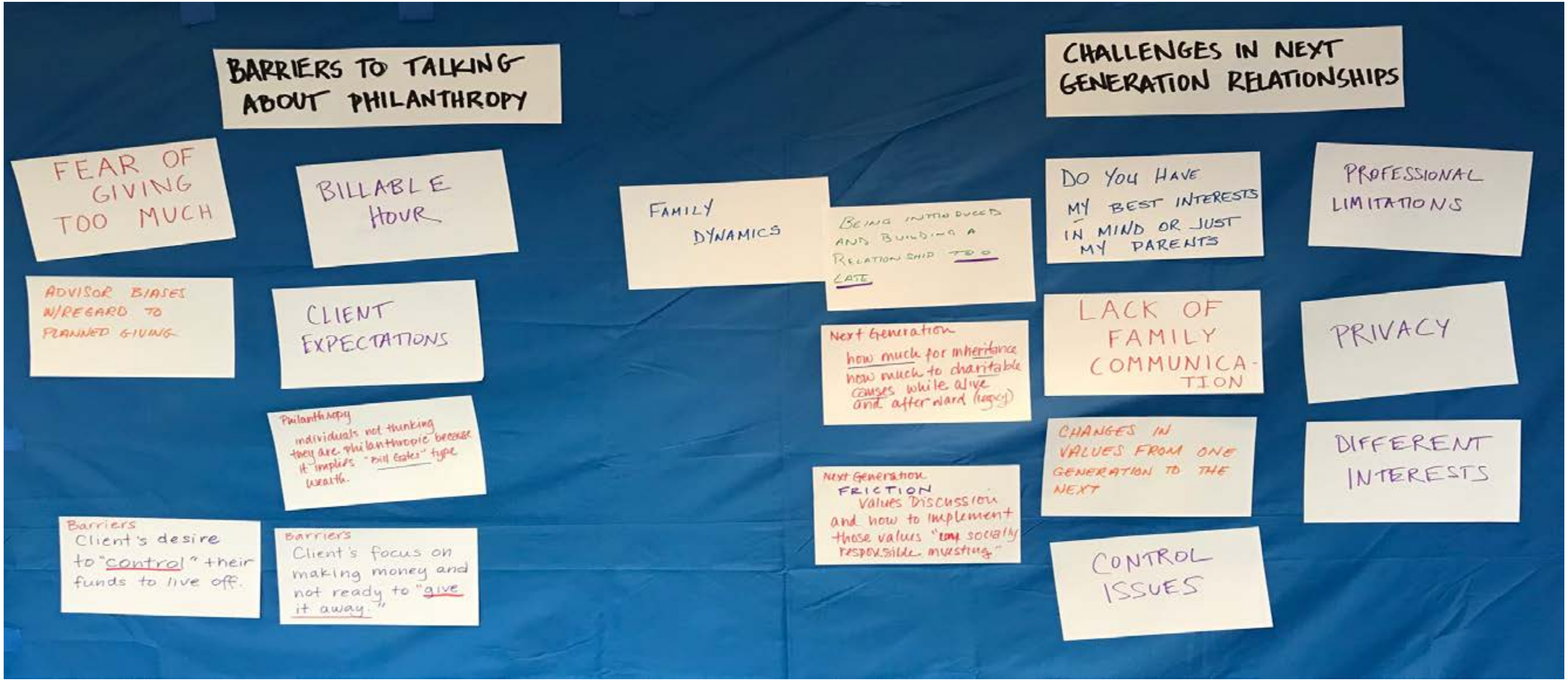
HOW CAN WE HELP ESTATE PLANNERS ASK THE QUESTION?



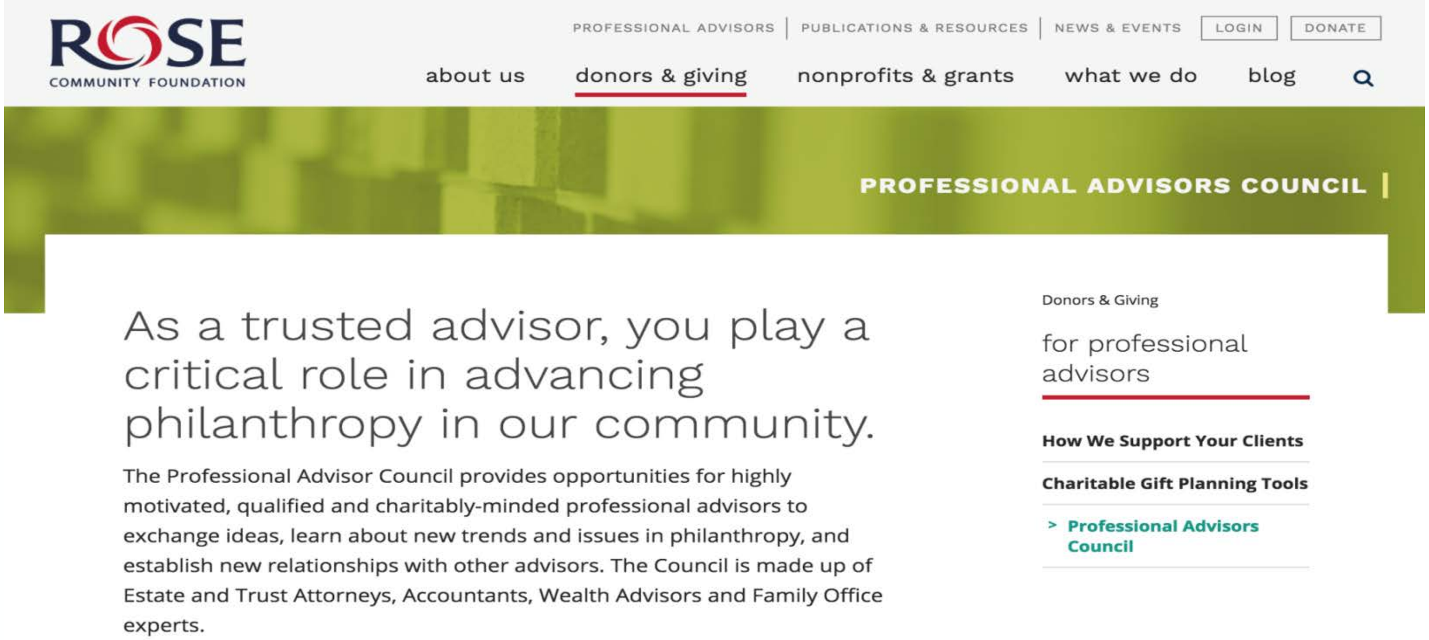
BARRIERS AND CHALLENGES



BARRIERS AND CHALLENGES



CASE STUDY: PROFESSIONAL ADVISOR COUNCIL



WHAT HAVE YOU TRIED AT YOUR ORGANIZATIONS?

NEXT STEPS AND TAKEAWAYS

NEXT STEPS :

- Try out the *Values Tool* with your own donors and advisors
- Prioritize advisors – make time for meetings
- Create an implementable communications plan
- Share what you have learned here at the conference with advisors

TAKEAWAYS:

- Advisors are looking for ways to differentiate themselves and sustain their relationship with clients and the next generation
- Be their reliable resource for community expertise and stewardship
- Share strategies that help advisors discover what matters to their clients - to ultimately align planning with their clients' values and benefit the greater community

Rose Community Foundation works to enhance the quality of life of the Greater Denver community through its leadership, resources, traditions and values

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