

Talking Points

Beginning a conversation with your client about charitable giving can be the most difficult hurdle to overcome. But it can be as simple as asking, "Do you have a favorite charity or charities?" If the answer to that question is "yes," you have the valuable opportunity to show your client the role that charitable giving can play in his or her individual financial and estate plans. Here are some talking points to get you started:

1. "Do you have a favorite charity or charities?"
2. "Do you give to more than one charitable cause?" (If yes, a donor advised fund may be appropriate for your client.)
3. "Are you interested in creating a personal or family legacy in the community?" (This can create an excellent vehicle for family philanthropy and education.)
4. "Would you like to advise on grantmaking?" (Again, this is a reason to suggest a donor advised fund to a client.)
5. "Would you like to know that your contributions are being used properly by the charity or charities to which you contribute?" (Our Program and Policy Department is responsible for the follow-up procedure with respect to a grantee.)
6. "Would you like to learn about charitable giving options that will create both an income stream for you and/or another and give you a current charitable tax deduction?" (You can suggest either a charitable remainder trust or a charitable gift annuity.)
7. "Have you considered establishing a private foundation?" (You can suggest a supporting organization as an option.)
8. "Would you like to receive the maximum tax benefits permissible under law?" (This is available through a community foundation.)
9. "Do you care about the stewardship and financial management of your contributions?" (The Pittsburgh Foundation oversees the investment management of the funds.)