



FOR PROFESSIONAL ADVISORS

THE POWER TO STRENGTHEN YOUR CLIENT RELATIONSHIPS

*Westmoreland County's
farmland and rural
communities, including
Delmont, Pennsylvania are
working to rebound and
meet the needs of residents.*

As a professional financial advisor, your clients trust you to provide expert guidance in achieving their goals. When it comes to their charitable goals, you can rely on the Foundation to elevate the trust you've built. We have helped professional advisors establish endowment funds for their clients since 1995. We're here to support you and your client every step of the way with an array of concierge-level support services.

BY WORKING WITH THE FOUNDATION YOU WILL BE ABLE TO:

- Offer comprehensive plans to achieve your clients' charitable goals and create a legacy.
- Provide your clients with the opportunity to receive maximum tax benefits.
- Rely on a team of experienced specialists to lift the burden of administration.
- Choose from a variety of options to establish or add to your clients' fund including planned gifts, CGAs, CRTs, CLTs, IRAs, life insurance, bequests, 401(k)s and other life income tools.
- Start a fund quickly and easily, within 24 hours.
- Fully integrate gift planning with estate planning and business succession planning.
- Enjoy an array of exclusive support services for advisors such as continuing education, seminars, site visits and client appreciation events through The Center for Philanthropy.
- Have the option to maintain a lifetime relationship with your clients through the management of their fund.



MAINTAIN OVERSIGHT OF YOUR CLIENTS' ASSETS.

Donors often request that their contributions be managed by their own financial advisors. To accommodate these requests, the Foundation empowers qualified financial advisors who have been approved by our Investment Committee to maintain investment advisory capacity over their clients' assets. The process of becoming a Third Party Manager includes:

- Review our Investment Policy and complete the Due Diligence Questionnaire.
- We review and present the Questionnaire to Investment Committee for approval.
- Official approval is contingent upon your client establishing a fund with the Foundation.
- Once fund is established, we can help you develop joint marketing materials.

The Foundation regularly organizes Continuing Learning Events that help advisors gain knowledge and stay ahead of trends.

ADVANCE YOUR CREDENTIALS WITH A CAP® DESIGNATION.

The Foundation partners with the American College of Financial Services in Philadelphia to offer group study opportunities and peer support in earning the Chartered Advisor in Philanthropy® designation. These graduate level courses will:

- Provide you with the knowledge and skills needed to help clients achieve their highest aspirations.
- Give you insight into the process of philanthropic planning including tax, tools and techniques.
- Enable you to integrate gift planning with estate planning, business succession planning and investment advisory services.
- Position you as a confidante who your clients can turn to for charitable giving expertise.
- Qualify you for continuing education credits.
- May be applied toward a master of science in Financial Services degree.
(Space is limited to 20 participants per class).

Find out more about our concierge-level support services for financial advisors by calling 724-836-4400 or visit us at cfwestmoreland.org.