



Here for Good

# Community Foundation for Monterey County

## Welcome to Advisor Solutions



One of the most important ways the Community Foundation for Monterey County (CFMC) inspires philanthropy is by [partnering with local professional advisors](#) like you to provide charitable solutions for your clients.

We hope you enjoy this issue of Advisor Solutions, a new planned giving resource for professional advisors highlighting current trends, case studies and industry insights.

The CFMC is pleased to welcome Andrea Scott, Director of Gift Planning (above left) to our Philanthropic Services team. She can help provide your clients charitable giving options whether in their lifetime or through their estate, including running gift illustrations. You can reach Andrea at [andreas@cfmco.org](mailto:andreas@cfmco.org) or (831) 375-9712 x124.

Please don't hesitate to contact us. We would be happy to assist you and your clients to help them achieve their charitable giving goals.

*Christine*

[Christine Dawson](#)

Senior Vice President of Philanthropic Services

## Trends in Planned Giving (Video)



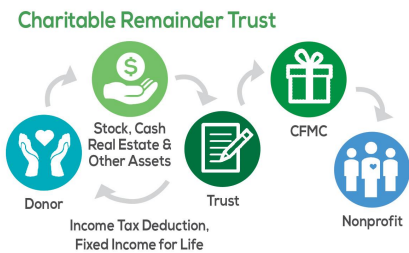
Trends in Planned Giving  
October 14, 2021

In case you missed it, enjoy the [video recording](#) of the Trends in Planned Giving

presentation on October 14. The video features an update on the CFMC with Dan Baldwin President/CEO. Michael J. Jones, Thompson Jones LLP, covers IRA planning after the SECURE Act and the program concludes with an update on pending legislation affecting donor advised funds (ACE Act).

Planned Giving  
Video

## Life Income Gifts (CRTs and CGAs)



A [life income gift](#) is a great option for those clients that want to make a difference while also ensuring they have a reliable income. These gifts can provide payments to the donor or others for one or more lifetimes. Here, we describe two options, [Charitable Remainder Trusts \(CRTs\)](#) and [Charitable Gift Annuities \(CGAs\)](#) that may be a sound choice for your clients.

Life Income Gifts

## Tax Implications of the Infrastructure Bills: Keep Calm and Carry On

*"Whatever the future may bring, we know that donors are motivated to give by their passion for the organization's mission. Even if tax changes and the political debate discourage some donors, good gift planning can help maintain and even increase the quality and quantity of their giving." - Craig Wruck*

In this blog, Craig Wruck breaks down potential implications of the "Bipartisan Bill" – Infrastructure Investment & Jobs Act (HR 3684) and the "Reconciliation Bill" – Build Back Better Act (HR 5376). In addition to trillions of dollars in additional infrastructure items, as well as social programs and expansions of health care, the Reconciliation Bill includes several provisions of particular interest to charitable gift planners. [Read more](#) (by Craig Wruck, courtesy PG Calc)

Tax Implications

## Legacy Newsletter

Our latest issue of our "[Leaving a Legacy](#)" newsletter introduces [Jean Duff](#), who first came to the CFMC in 2014 to establish a donor advised fund, but has since helped maximize her giving through a [Charitable Gift Annuity](#). She established the CGA to benefit a dear friend with income for life and the remainder will go to Jean's



donor advised fund.

Also read how your clients like Leslie Mulford can do good while while saving taxes with an [IRA Qualified Charitable Distribution \(QCD\)](#).

Legacy Newsletter

# Planned Giving Options & Strategies for Your Clients

The CFMC is committed to helping you create the best gift plans to meet your clients' needs. Learn more about the [types of gifts and strategies](#) your clients can consider.

Planned Giving Options

## Community Foundation for Monterey County



Contact Us

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*To inspire philanthropy and be a catalyst for strengthening communities throughout Monterey County*

