

PHILANTHROPY

*Inc.*

EST.



2015

# UNPARALLELED SERVICE.



IT'S WHY YOUR CLIENTS CAME TO YOU.  
IT'S WHY YOU'LL COME TO US.

You provide your clients with the highest levels of service and financial expertise. So when they raise the subject of philanthropy, you want to feel confident that you continue to provide them with that same level of expertise.

## **Which is why a partnership with the Marin Community Foundation makes sense.**

MCF is a leader in the field of philanthropy, renowned for building trusted, long-term relationships and providing highly tailored service.

And with **Philanthropy Inc.**, MCF's customized philanthropy service for advisory firms, you can offer your clients a powerful way to manage their giving, while you maintain responsibility for assets under management.

Philanthropy Inc. allows you to focus on your core competency — wealth management — and for MCF to seamlessly handle your clients' charitable giving with a local team who have unrivaled expertise in the field of strategic philanthropy. Your valued clients will enjoy the individualized attention their giving deserves from issue area experts, and you can choose the precise level of involvement your firm prefers.

If you have a client, or group of clients, with \$5 million or more to direct towards charitable purposes, you are immediately eligible to participate.

98.4% of high net worth households donate an average of \$70,000 annually. And plan to give even more in the future.

**Charitable giving is a fundamental part of your clients lives.**



## ADVISORY BENEFITS

- Retention of assets under management
- Inclusion of philanthropy in comprehensive wealth management offering
- Enhanced client relationships
- Access to planned giving support & vehicles
- Endowment opportunities
- A dedicated relationship manager at MCF
- Access to exclusive events and networking opportunities



## CLIENT BENEFITS

- Dedicated philanthropic advisor
- Access to world-class philanthropic knowledge
- Tax advantages only available to public benefit foundations
- Sophisticated online account management
- Access to a diverse range of charitable giving vehicles
- Networking opportunities with a community of like-minded donors
- A Bay Area resource that understands the local landscape





**PHILANTHROPY INC. IS THE PROGRAM THAT WILL  
EXTEND YOUR ORGANIZATION'S SERVICES AND  
AMPLIFY YOUR IMPACT WITH YOUR CLIENTS NOW,  
AND FOR FUTURE GENERATIONS.**

Trust us to treat your clients like you do.

Contact Linda Sweeney or Safia Kryger-Nelson to get the details.



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**WWW.PHILANTHROPY-INC.ORG**