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# PROFESSIONAL ADVISOR TOOLKIT

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# WORKING WITH US

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*If you work with philanthropic families or companies, we can help you understand and assess tax-saving options to make the most of your clients' charitable giving, while at the same time maximizing your business with your clients.*

*In addition, you will be connecting your clients with the most trusted leader in the philanthropic field. We are nationally recognized for our ability to handle challenging charitable transactions and for our in-depth knowledge of charitable giving. Instantly you and your client will have access to a staff of professionals who will make sure each charitable investment provides the greatest emotional, civic and financial benefit possible.*

## **Maximize Your Clients' Giving**

*The Greater Kansas City Community Foundation and Greater Horizons are public charities, so your clients will receive the maximum tax deduction allowed by law, avoid capital gains tax and may be eligible to receive a lifetime income stream. We look at each donation individually and create giving plans that maximize gifts to the community and provide bottom-line benefits to the donor.*

*The Greater Kansas City Community Foundation and Greater Horizons are not engaged in rendering legal, accounting or other professional service. If legal advice or other expertise is required, the services of a competent professional should be sought.*

# HOW A FUND WORKS

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*Our donor-advised funds, also known as charitable giving accounts, make giving easy and meaningful.*



*Your clients can give cash, stock or other assets to a donor-advised fund. Contributions are tax deductible.*



*Your clients can use their funds to support their favorite charities.*



*Your clients can invest through a financial advisor or in our pools. Charitable dollars grow tax-free.*

# FINANCIAL ADVISOR PROGRAM

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*Participating in our Financial Advisor Program creates a distinct advantage for financial advisors and their clients. Financial advisors can continue to manage their clients' assets and meet their clients' tax and charitable goals.*

***"The Financial Advisor Program is valuable to both advisors and their clients. The Greater Kansas City Community Foundation and Greater Horizons can handle complex charitable transactions, including the donation of real estate and closely held interests, giving financial advisors the power to offer flexible options not otherwise available. More importantly, advisors can continue to manage their clients' finances no matter what type of charitable giving vehicle they choose."***

**Richard Mistler, UBS Financial Services Inc.**

## **A Win-Win for You and Your Clients**

*The Financial Advisor Program benefits everyone involved, creating a significant and positive impact for clients' charitable causes. Financial advisors can:*

- *Continue to manage the assets contributed by their clients on their firms' investment platforms.*
- *Convert non-managed client assets, such as real estate, closely held interests, businesses, personal property and art into charitable dollars that the advisor will manage.*
- *Offer clients a value-added service by connecting them to some of the best charitable giving products and services on the market.*

## **Identifying Clients Who Qualify**

*Candidates for this program might:*

- *Plan to sell a private company*
- *Have high capital gains tax exposure*
- *Be in a "transition" phase of life—empty nest, retirement, involved in estate planning*
- *Want a charitable tax deduction now with the flexibility to make distributions in the future*
- *Want to grow their contributions tax-free over time*
- *Have a desire to give something back to their community*
- *Want to leave a legacy for future generations*

*The Financial Advisor Program requires financial advisors to adhere to professional and industry standards in managing donor funds. Statements are reconciled monthly.*

# COMPLEX ASSETS

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*Charitable giving encompasses more than just cash donations. Families and businesses can tap into our expertise to quickly and easily donate hard-to-value assets, and open family or corporate funds to further their charitable goals.*

*Your clients may be able to attain a new level of giving they might not have considered possible through assets they already own. We specialize in accepting complex assets for charitable purposes, including:*

## *Gifts of Real Estate*

- *Personal Residence*
- *Commercial Property*
- *Farmland or Undeveloped Property*
- *Other Real Property*

## *Gifts of Business Interests*

- *Closely Held Stock (S-Corp, C-Corp, LLC)*
- *Partnership Interests*

## *Gifts of Personal Property*

- *Artwork*
- *Royalties, Copyrights, Patents*
- *Valuable Collectibles*

## *Other Alternative Asset Gifts*

- *Life Insurance Policies*
- *Retirement Plans*
- *Negotiable Instruments*
- *Oil and Gas Interests*
- *Private Equity*

*This list is not intended to be all-inclusive of acceptable complex assets. Charitable gift acceptance is dependent upon asset review and approval.*

# CONTACTS FOR ADVISORS

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**Katie Gray** oversees our investment and finance teams. Katie works closely with financial advisors and their clients to integrate charitable funds into overall financial plans.  
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