FOUNDATION FOR METROWEST

# Talking To Your Clients About Charitable Planning

Discussing charitable giving with your clients often provides significant opportunities for you to advise your clients on the most advantageous options for them to meet their financial, charitable and life-time goals. Some suggested questions to help you begin/facilitate the conversation:

- Do you currently support any charitable organizations, either by volunteering or by giving financially?
- Are you interested in supporting those organizations after your death?
- Do you wish to include charitable giving in your financial or estate plan?
- Have you thought about the kind of personal legacy you want to leave behind for your family or community?
- Would you be interested in exploring ways to support your community, if you could still leave a substantial portion of your estate to your children?
- Would you be interested in exploring ways to support your community, if you could significantly reduce your income or estate taxes?
- Some clients are interested in passing along more than money to their children. What would you like your personal and/or family philanthropic legacy to be? Do you want to teach your children to give in the same manner you give? Would you be interested in learning how philanthropy can be used to pass on your family's values?
- If your estate proves to be larger than the amount you planned to leave your children, would you consider making a charitable gift with the excess?
- Would you consider adding a charitable provision to your estate plans should your spouse and/or children not survive you?
- Would you consider leaving your retirement accounts to charity as a tax-planning strategy?
- If someone with expertise in this area could help you identify charities that are worthy of your support, would you be interested in exploring some charitable planning ideas?