



PROFESSIONAL ADVISOR NEWSLETTER

MONTHLY NEWSLETTER

APRIL 2025 TRENDING TOPIC 1

**YOUR PARTNER IN STRATEGIC PHILANTHROPY PROFESSIONAL
ADVISORY SERVICES.** Empowering Financial Growth and Community Impact



FRAN BROLLEY

President and CEO

Starved Rock Country Community Foundation



GREETINGS FROM SRCCF!

UPDATES FROM YOUR COMMUNITY FOUNDATION TEAM FOR APRIL 2025

Hello from the Starved Rock Country Community Foundation!

The SRCCF team is honored to work with attorneys, CPAs, and financial advisors as you help your clients achieve their charitable giving goals. Put us on speed dial—we want to be your first call when the agenda turns to philanthropy!

As part of our service to you and other advisors, the SRCCF is committed to letting you know about trends and developments that may impact your clients' charitable giving strategies. To that end, we are releasing two April 2025 newsletters with topics that are popping up frequently in our

conversations with both donors and advisors. We'll address one at a time, so please read Topic 1 in this newsletter and Topic 2 in the next April 2025 newsletter.

Please reach out anytime you're dealing with a client matter related to charitable giving. We can almost always provide a solution, and if we can't, we will recommend the best next steps for you and your client.

Happy spring!

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TRUST MATTERS: YOUR CLIENTS' GO-TO RESOURCE FOR COMMUNITY IMPACT

As attorneys, CPAs, and financial advisors, you know very well that trust is at the foundation of your relationships with clients. Your clients are seeking a similar level of trust with the people and organizations that are helping carry out their philanthropic wishes.



Fortunately, trust in charities has shown an increase after a recent dip. According to the 2024 Edelman Trust Barometer and the Independent Sector's "Trust in Nonprofits and Philanthropy" report, trust in nonprofits rebounded by 5 points to 57% in 2024, following a four-year decline. This increase positions nonprofits as the most trusted sector compared to government, business, and media. Still, nonprofits face challenges and concerns about maintaining this trust, including general skepticism about institutions, as well as increasing expectations that charities demonstrate transparency and accountability.

Here's how:

TRUSTWORTHY INFORMATION ABOUT PARTICULAR CHARITIES

The SRCCF is a valuable source for objective, timely information about specific charities and the impact of particular programs. By working with us, your clients can leverage a transparent and trustworthy avenue for learning about how best to make a difference for their favorite causes.

WIDE-RANGING EXPERTISE ABOUT COMMUNITY NEEDS

At its core, the SRCCF is committed to achieving impact. This means that our team keeps a finger on the pulse of local needs, whether related to social services, health care, education, the environment, the arts, community development, or any other community priority. With a deep understanding about community needs, we can be an excellent sounding board for your clients who want to learn which charities are addressing each need and how those charities are measuring results.

BROAD SET OF TOOLS FOR STRUCTURING CHARITABLE GIFTS

Our team can help establish a tax-efficient structure to achieve each client's goals for community impact. Available vehicles include not only donor-advised funds, but also other types of funds such as designated funds to support specific charities and field-of-interest funds to address particular causes, as well as multi-generational funds to involve clients' children and grandchildren. The SRCCF offers your clients a flexible and effective way to manage charitable giving by simplifying their giving processes and maximizing potential tax benefits.


The bottom line here is that we encourage you to reach out to the team at the SRCCF anytime you are evaluating how to structure a charitable giving plan to achieve both your client's charitable goals and financial goals. Our team is here to help. In many cases, our tools and services are a great fit for your client's needs. If not, we will point you in the right direction.

As always, we want to be your first call! Please reach out to us anytime the topic of charitable giving comes up during a client conversation.

STARVED ROCK COUNTRY COMMUNITY FOUNDATION

*Connecting People Who Care
With Causes That Matter*

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The team at the community foundation is honored to serve as a resource and sounding board as you build your charitable plans and pursue your philanthropic objectives for making a difference in the community. This newsletter is provided for informational purposes only. It is not intended as legal, accounting, or financial planning advice. Please consult your tax or legal advisor to learn how this information might apply to your own situation.

**THANK YOU FOR THE OPPORTUNITY
TO WORK TOGETHER!**

