Starved Rock Country COMMUNITY FOUNDATION

PROFESSIONAL ADVISOR NEWSLETTER

MONTHLY NEWSLETTER | NOVEMBER 2026 TRENDING TOPIC 2

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



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GREETINGS FROM SRCCF!

WE'RE HERE FOR YOU. NOVEMBER 2026 TRENDING TOPIC 2

Hello from the Starved Rock County Community Foundation!

November is here, and the year-end planning season is in full swing! As you work with clients to wrap up 2026 and prepare for the year ahead, remember that charitable giving can be an important part of the conversation. The SRCCF team is here to help you make the most of these opportunities, strengthen client relationships, and stay on top of trends in philanthropy.

Women and wealth: Strengthening relationships through charitable planning

Women are playing an increasingly important role in financial decision-making, and new research offers valuable insights into what female clients want from their advisors.

Charitable giving can be an especially effective way to deepen these relationships, explore clients' priorities, and engage multiple generations of a family. The SRCCF is happy to help you make philanthropy part of the conversation.

As always, thank you for making the SRCCF your first call when charitable giving matters arise in your work. We are honored to serve as a resource and sounding board as you help your clients achieve their financial and philanthropic goals. Please reach out anytime. We look forward to hearing from you!

Pamela

Pamela Beckett, Founder
Chief Philanthropic Officer

01 WOMEN AND WEALTH: STRENGTHENING RELATIONSHIPS THROUGH CHARITABLE PLANNING

Women are playing an increasingly influential role in wealth management, and new research suggests that advisors have an opportunity to strengthen relationships by paying closer attention to what female clients want from financial advice.



According to Vanguard's 2026 Women & Wealth Study, 76% of women feel confident making financial decisions, and women rank educational and collaborative as their top two preferred communication styles from a financial professional.

Meanwhile, a recent AdvisorHub article highlights the growing importance of planning that connects financial decisions with broader goals as women assume greater responsibility for family wealth.

For advisors, charitable giving offers a particularly effective way to build these relationships. Philanthropy can open conversations about personal priorities, family dynamics, and long-term goals that might not otherwise emerge during a traditional financial planning meeting.

Here are three suggestions for incorporating charitable giving into your approach to working with women clients.

ASK ABOUT CHARITABLE INTERESTS BEFORE INTRODUCING CHARITABLE PLANNING TOOLS.

Rather than beginning with tax deductions, donor-advised funds, or charitable trusts, consider asking what causes matter most to your client and what she hopes her giving will accomplish. Perhaps she has a longstanding relationship with a local nonprofit, wants to address an emerging community need, or is interested in supporting a cause that reflects her personal experiences. These conversations can help you better understand her priorities before recommending a particular strategy. The SRCCF can be a valuable resource, offering insights into local charitable

organizations, community needs, and giving opportunities that align with your client's interests.

MAKE CHARITABLE PLANNING A COLLABORATIVE PROCESS.

Research suggests that women value financial expertise while also wanting to participate actively in decisions. Indeed, InvestmentNews reported on a Nationwide survey finding that although 95% of women investors believe their advisors treat them with the same respect as male clients, nearly one-third reported experiencing patronizing explanations of financial concepts. Charitable planning provides an opportunity to demonstrate a more collaborative approach. Consider presenting several giving options, explaining the advantages and limitations of each, and inviting your client to help shape the strategy. Whether she is evaluating a gift of appreciated stock, establishing a donor-advised fund, or considering a charitable provision in her estate plan, we can join the conversation to help explore options and answer questions.

USE PHILANTHROPY TO ENGAGE THE ENTIRE FAMILY.

A recent Fortune article highlights how younger members of billionaire families are pushing their parents and grandparents to accelerate charitable giving and embrace more innovative, impact-driven approaches to philanthropy, including addressing systemic problems, empowering communities, and making a difference during donors' lifetimes rather than waiting to distribute wealth through their estates.

Charitable giving can also provide a natural opening for conversations about family relationships and the transfer of wealth and values across generations. For clients who want to involve children or grandchildren in philanthropy, a donor-advised fund or another charitable fund at the SRCCF can offer a practical framework for making giving decisions together. These conversations may be especially valuable when a woman assumes greater responsibility for family financial decisions after retirement, an inheritance, or the loss of a spouse. Indeed, building relationships before major wealth transitions is essential. The Starved Rock Country Community Foundation can help families explore shared charitable interests, develop giving traditions, and create opportunities for multiple generations to participate.

Of course, every client is different, and charitable giving should always reflect an individual's interests and goals rather than assumptions based on gender. The larger lesson from recent research is that women want advisors who listen, provide expertise, and recognize their role as informed financial decision-makers.

By incorporating philanthropy into these relationships, advisors can gain a deeper understanding of what matters to their clients while helping them translate their values into meaningful charitable action. The SRCCF is always happy to serve as a resource, working alongside you and your clients to explore opportunities for charitable giving that support both financial and personal goals.

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!

Starved Rock Country COMMUNITY FOUNDATION