

BENEFITS OF A COMMUNITY FOUNDATION



Regardless of whether you are an attorney, estate planner, accountant, or financial advisor, your clients' best interests are always your priority—and they are ours too.

Whether your clients are in the process of selling a business, handling an inheritance, or developing an estate plan, we can assist in creating giving strategies that are impactful, tax-efficient, and effective. Consider us the charitable extension of your professional team, providing support to you and your clients at every stage while you retain complete control over your client relationships.

WHY ADVISORS PARTNER WITH NORTHSHERE COMMUNITY FOUNDATION:

1. A no-cost resource for charitable planning

From alternatives to private foundations to income-producing gifts, we help design customized, tax-wise solutions to fit your clients' goals.

2. Streamlined, simple paperwork

We make it easy with clear fund agreements tailored to your clients. Funds can be created quickly and named for privacy or recognition.

3. Local expertise that matters

With deep knowledge of the Northshore's needs and nonprofits, we can guide clients with personalized grantmaking support.

4. Your role comes first

You remain at the center of your client relationships. We simply provide tools and resources to help you achieve their financial and philanthropic objectives.

5. Flexible gift options

From insurance and appreciated stock to real estate and partnerships, we handle a wide range of assets to simplify giving and maximize tax benefits.

6. Growing charitable impact

Our investment strategies safeguard and grow charitable funds, helping your clients support the causes they love well into the future.

7. Education & Connections

We provide seminars where you can earn continuing education credits while networking with other top professionals in the region.

8. Support when you need it

NCF is here for you and your clients with accessible guidance, connections to local nonprofits, and practical resources to make giving easier—all at no cost.