PHILANTHROPIC PLANNING

CLIENT OPPORTUNITY MAP FOR PROFESSIONAL ADVISORS

As you listen today, think about the clients in your practice who may benefit from a more intentional conversation about charitable giving, philanthropy and legacy planning. The goal is to leave with a list of clients to contact—not necessarily all the answers.

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CLIENTS TO CONSIDER

Client	Why They Come to Mind (circle best options)	Conversation Opportunity	Next Step
	Giving Retirement Sale/Liquidity Estate Family/Legacy		
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WHAT SHOULD I BE LISTENING FOR?

- Give regularly to **multiple charitable organizations**
- Hold highly **appreciated stock** or other appreciated assets
- Recently sold or are preparing to **sell a business** or significant asset
- Want to **involve children** or grandchildren in philanthropy
- May benefit from establishing or contributing to an **endowment**
- Want more **strategic or tax-efficient** ways to give
- Are **approaching retirement** or beginning to take RMDs
- Are beginning or revisiting **estate planning**
- Have expressed interest in a lasting **charitable legacy**
- Have charitable intent but **have not developed a formal plan**

CONVERSATIONS WORTH HAVING

Use these prompts to move from identifying an opportunity to deciding what conversation you want to initiate.

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What question could I ask that might open the door to a deeper philanthropic conversation?	Which clients should I make a point to contact following today's event?

PRIORITY CLIENTS

1. _____ 2. _____ 3. _____ 4. _____ 5. _____

WHO ELSE SHOULD BE AT THE TABLE? (circle best options)

Financial Advisor / Wealth Manager Estate Attorney CPA Community Foundation Family Members Other: _____

MY FOLLOW-UP

The client conversation I am most likely to have first:	The question I want to ask:
My next step:	**When will I follow up?**

LET'S CONNECT!

Scan to email Leslie, President & CEO of the Northshore Community Foundation, and learn more about our Professional Advisor Network.