MONTGOMERY COUNTY COMMUNITY FOUNDATION
Looking forward. Giving back.

TOOLS FOR PROFESSIONALS

TOP TEN REASONS WHY YOU SHOULD DISCUSS PHILANTHROPY WITH YOUR CLIENTS

Research conducted by The Philanthropic Initiative (TPI) in the late 1990's with professional advisors on their motivations for, and methods of providing advice about philanthropy, revealed the following reasons for discussing philanthropy with clients:

1. It's good for society, it's good for your community, it's good for your clients, it's good for your business, and it's good for you.
2. Many of your clients are searching for an effective way to give back to their community, to memorialize a loved one and/or simply to "do good." You can help them achieve these results, and derive personal satisfaction from doing so.
3. Discussing philanthropy with your clients should be done unobtrusively in a way that respects their privacy, values, and autonomy. You are among the best positioned to initiate and engage your client in these conversations.
4. By expanding the menu of services offered to your clients, you build confidence and increase levels of satisfaction with you and your professional services.
5. Your areas of expertise as a professional advisor are personally broadened.
6. The potential for new referrals is enhanced, opening the door to many new clients.
7. You effectively connect your chosen profession with a personal desire to do something good for your community.
8. Through your efforts, important social needs in your community can be addressed, producing a healthier, more vibrant place to live - an enduring legacy of real benefit to future generations.
9. You become part of a supportive network of like-minded colleagues who are willing to voluntarily share their time and expertise.
10. With practice, confidence and experience, you will find it easy to do.

Adapted based on material from the report *Doing Well by Doing Good*, published by The Philanthropic Initiative (TPI), June 2000.

THE MONTGOMERY COUNTY COMMUNITY FOUNDATION
119 E Main, Crawfordsville, IN 47933 **P**: (765) 362-1267 **F**: (765) 361-0562 **W**: www.mccf-in.org