



Seven questions for estate and financial advisors

1. Do you have clients who care deeply about their community?
2. Do they give to more than one charitable cause?
3. Are they interested in creating a personal or family legacy in their community?
4. Are they considering the creation of a private foundation, but are concerned about cost and administrative complexity?
5. Would they like to stay personally involved in the use of their gift dollars?
6. Do they want to receive maximum tax benefit for their charitable contributions under state and federal law?
7. Do they place a priority on sound financial management of their contributions?

If you answered **yes** to any of these questions, your clients would benefit from knowing more about the Montana Community Foundation. We'd be happy to help you make an introduction.

“It’s probably not malpractice if I don’t discuss philanthropy with my clients, but I consider it a sin of omission if I don’t. And in that conversation, I have to acknowledge that no one is wrong in the way that they want to or don’t want to give. Everyone is different. **But everyone has the ability to be a philanthropist.**”

– Dale Woolhiser, donor and financial advisor



The Montana Community Foundation is a wonderful resource for anyone who has a dream they want to work on. They have all the tools to make that easy. ”

— Jo Ann Eder, donor